GRADUATION PROJECT

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Acknowledging the experience factor for music festivals with an attempt of a new visitor typology: Fans, conditional adventurers and adventurers.

An exploratory study.

"*A concert is not a live rendition of our album. It's a theatrical event.*"

Freddie Mercury (Queen)

Oath and restrictions

I hereby declare under oath that this master's thesis in the Master of Science in International Marketing at the ESC Rennes School of Business is the product of my own independent work. All content and ideas drawn directly or indirectly from external sources are indicated as such. The thesis has not been submitted to any other examining body and has not been published.

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Rennes, December 1st 2012   _____

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Acknowledgements

Abstract

The development of the music industry in the first decade of the 20th century indicates a value shift inside the music business, away from the physical goods-based business models; towards those who grant digital access to music at a low price and those who are able to deliver outstanding experiences. Live music is not a promotional tool for artists anymore, rather a primary source of income. Building on the recent evolution of the music industry and more and more experience-hungry consumers, the present thesis explores the existence of a new festival visitor typology, distinguishing between content-motivated, experience-seeking and a "hybrid" type, which is sensitive to both content and experience design. The empirical part is based upon a qualitative research carried out in the context of the New Fall Festival 2012. Also, a survey conducted among festival attendees included interesting results, which were used to support the qualitative research.

The results of this study show that while it is difficult to clearly classify visitors as one of these types - because of the high dependence on the content and rather theoretical nature of the experience theory – especially new and innovative festivals can broaden the types of visitors attracted, by adopting an experience-based positioning and optimizing their customer experience. At the end of the thesis, recommendations with concrete steps are made for companies who want to implement such a strategy in order to head towards experience-based differentiation.

Word count for the main body of the thesis: 15.444

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List of abbreviations used

Abbreviation	Meaning
CEM	Customer Experience Management
DRM	Digital Rights Management
e.g.	From the latin *exempli gratia*, equivalent to the English expression *for example*, used to illustrate what has been advanced or to make a non-exhaustive list of what has been discussed
i.e.	From the latin *id est*, equivalent to the English expression *that is (to say)*, used to give further explanation
NFF	New Fall Festival
Transl.	Tanslated by the author of the thesis from the original source
WOM	Word-of-mouth

Glossary

Word	Explanation
Headliner	Main act, usually a major, more famous artist performing on a festival or event
Line Up	Synonym for the festival program, it is composed of all the bands and artists performing in the context of the festival
Memorabilia	Memorabilia extend the customer experience by reminding him/her of the consumption which took place, comparable to the effect of souvenirs which tourists bring back from trips.
Running Order	Order of appearance of the bands during a given period of time, like a schedule
Support (act)	Lesser known artist performing before the headliner, benefiting from the audience which came for the headliner in order to gain a reputation

Introduction

In 2006, the English festival *T in the Park* was sold out (online tickets) within minutes of the tickets going on sale, at which point, not a single act had been announced (example given by Frith, 2007). Other successful festivals experience the same phenomenon, for instance the *Fusion Festival* in Lärz, Germany. This anecdote indicates that the motivations for buying the tickets for the event are not (only) led by the Line Up of the festival, but also by the festival experience itself (Frith, 2007) and seems to confirm predictions of an experience-seeking society (Toffler, 1970; Köck, 1990; Schulze, 1992; Pine & Gilmore, 1998). Some authors note a lack of specialized research concerning the relationship between customer's experiences and marketing the arts (Williams, 2006; Petkus, 2004) and its practical application for businesses in the music industry, who want to implement experience-based strategies (McCole, 2004; Gupta, 2003; Verhoef, et al., 2009). An experiential separation of different visitor segments has been undertaken and its relevance confirmed by Henderson & Wood (2012). However, the research concerning the different types of visitors has mainly beend limited to traditional segmentation criteria, rather than the relative importance of content and experience design.

The first part of the thesis is dedicated to providing the background as to why live music has become a critical revenue generating activity for the music industry, leading to the development of festivals. These festivals have their own rules and characteristics when it comes to marketing them and it appears to be difficult for new festivals to enter and innovate in the market. Further, the thesis focuses on the experience concept and emphasizes the emergence of it as a key success factor for companies, even more for those involved in the live music business. Eventually, drawing on the two previous chapters, the experience- vs. content-oriented typology is explained.

Eventually, drawing on the findings, recommendations will be made, limitations discussed and further research suggested.

Objectives of the thesis

Building on a series of in depth interviews conducted in the context of the New Fall Festival 2012, the empirical part seeks to validate the discussed typology and to find out the differences between those categories. The findings also include some quantitative data gathered outside this research project but which are relevant to the present topic. The results of the study will serve festival promoters to adapt their marketing strategies, especially those who launch new, innovative festival concepts, in a staurated festival market. The acknowledgement of the experience factor will help them to differentiate themselves from the competitors thanks to an outstanding customer experience. The thesis does not show how a promoter can innovate its festival concept, rather how to adapt its strategy and take advantage of the experience the event provides.

Company Overview: The SSC Group and the New Fall Festival

The SSC Group GmbH is a German SME based in Düsseldorf, Germany and was created in 1998. Additionally to the headquarters in North Rhine-Westphalia, it has two branches, one in Berlin and another one in Zurich, Switzerland. The agency's main activity is concert promotion, artist representation and event management. Moreover, the SSC Group also provides music-consulting services for companies who wish to organize music events for branding purposes. Examples of clients include Vodafone, Levi's and Ericsson.

One of the products in the company's portfolio is the New Fall Festival (NFF), a project created in 2010. The first edition of the event had been rather successful with a total of 4.500 visitors attending, a success confirmed with the second edition in 2012, welcoming over 5.500 visitors and recording an increase of 35 % of *paying visitors*. The program of the festival features artists ranging from Indie-rock, singer/songwriter and electro music influences and « should first of all reflect the autumnal feeling and spirit: quiet, intense and a bit melancholic. » It targets mainly young and middle-aged (25 – 45 years of age), urban people with a proactive approach to music. They are seeking a different, more adapted format to a growing dissatisfaction with exhausting concert and festival formats which require them to wait on their feet for hours before seeing a band perform, poor sound quality, limited space and late stage times.

The format of the NFF is more one of a concert series than what the target group associates with the concept of festival. In the 2011 and 2012 editions, the total number of concerts amounted to 7 (with mostly two artists performing per night and venue i.e. one support act and one headliner) on a 5-day period.

The differentiation factor lies within the location-based innovation factor and the unusual experience design in this particular music genre. The bands performing at the festival usually do so in multi-purpose halls and Open Air festivals. The concept of the NFF is to answer the aforementioned need for a different, more premium experience design and organizes the concerts in locations[1] which usually host classical music events. Particular attention is given to the customer experience as services such as catering, seating and cloak rooms are provided.

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[1] See appendices no. 1 and 2

Theoretical Framework

1. Background: The value shift in the music industry led to the success of the festival as an event format

1.1 A value shift in the music industry

Technological advances as game changers

Prior to the possibility of recording it, music had to be considered as a service; "the artists had to be physically present to perform, and equally, the listener had to be present at the same place and time of the performance" (Leonhard, 2008). Music as a product emerged in the second half of the 18th century with the vinyl recording format. It allowed music to be captured, stored and rendered. Suddenly, consumers could "own" the music. The traditional structure which lasted until the 1990's, the industry was based upon the dynamic of selling physical products on which music was stored, to grant access to music to the consumers which meant that the power was on the side of the companies record labels. Despite other technological breakthroughs (e.g. radio, audio cassettes, compact discs, mini-discs etc.), this model lasted for about one century. In the last decade of the 20th century, two technological advances would change the dynamics of the industry: digitalization and the internet.

These two factors turned the industry upside-down because the business models of the traditional music economy were made obsolete. They could not rely on selling the access to the music via the physical formats anymore; consumers could easily share the music from their computers, from consumer to consumer. In economical terms, music became a non-rival good i.e. a good which one doesn't lose when giving it away (copying) and its quality is not altered in the consumption and/or copying process. This profound transformation is often referred to as "digital revolution." This phenomenon is supported by concrete figures. The 2011 IFPI Digital Music Report compares the state of the digital music industry in 2004 and 2010 and reports a 1000% increase in the size of the market. However, the value of the industry decreased by 31% as the prices for music files steadily dropped towards zero. Nowadays, the sales of digital music account for 32% of the revenue of the industry. The following graphs illustrate the digital revolution:
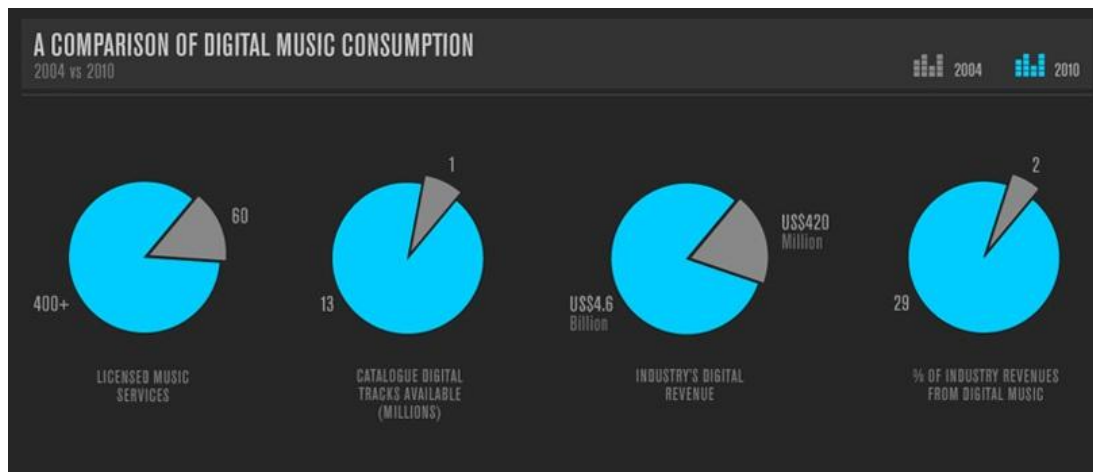
Parikh (1999) explains that the "waves of changes" will suppress traditional intermediaries e.g. retailers of physical products, diminish the roles of record labels. This assumption seems to become concrete, as the 2011 IFPI Digital Music report predicts 1.2 million fewer jobs in the industry by 2015. Therefore, the internet was considered a threat instead of an opportunity but it also brought artists closer to the music fans (see also Leyshon, 2001; Meisel & Sullivan, 2002). In order to maintain their dominant position, these companies tried several solutions e.g. implementing DRM and coming up with a series of lawsuits to prevent piracy, even though research proved these measures to be ineffective and rather counterproductive (Maffiolletti & Ramello, 2004; Liebowitz & Watt, 2006; Sinha, et al., 2010; see also Anderson, 2007, pp. 271) as "one must be careful not to confuse correlation with causality" (Cabral, 2009).

The Long Tail and the prosumer

According the long tail theory (Anderson, 2007) - originally a statistical concept - the sum of sales of lesser known products is superior or at least equal to the sum of sales from the best-sellers. The author applies this theory straight away in the introduction (pp. 1-15) to the music industry, illustrating it with the case of iTunes. Over the years, digitalization made access to a large music repertoire easier (see fig 1) and leads to consumers being more proactive. Eventually, they screen what is available to them until they find and buy niche products, or as Godin (2008) puts it: "just what is right for them". The following figure illustrates the Long Tail theory:

The fact that consumers actively search implies the notion of *prosumer* (Kotler, et al., 2002, pp. 36) who is more involved in what he/she listens to. This represents a significant evolution in consumer behavior as, in the past, the majority of music listeners used to "get fed" by channels, which pre-selected the products the customers listened to e.g. radio stations. The initiative was only partly let to the consumer, who had the choice between these filters. However, we can note that this does not mean that consumers are reluctant to this (necessary) filtering effect (Anderson, 2007, pp. 136-140). Music streaming services such as Simfy and Wimp emphasize their editorial content which serves the purpose of recommending and preselecting artists. Spotify adopts a similar approach than amazon ("customers who bought this article also bought..."), recommending similar artists than the one which the consumer is currently streaming. It appears to be necessary for consumers to have some kind of filter, in order not to get lost in the abundance of music files which they have access to. Anderson (2007) sums this up by giving two success factors for Long-Tail-companies i.e. companies focusing on niche markets: Make everything available and help the consumer finding it.

Displacing value onto related products and/or services

As a result of dropping CD sales, industry players regarded the internet as a threat rather than an opportunity. However this negative view was based on an

assumption that value was destructed when it was actually just displaced. Bourreau et al. (2008) concluded in their research that there are "two dominant modes of value extraction for the recorded music industry in the digital age: either by content protection or by displacing value onto related products or services." One of these "related products or services" sectors is the live music sector. Indeed, many research papers tend to indicate that the music industry benefits more from digitalization and the abundance of music than it harms it (Peitz, et al., 2006; Tanaka, 2004; Zentner, 2006; Mortimer & Sorensen, 2005) because consumers are attracted by the live experiences of artists they discovered thanks to the internet at low or no cost. In that sense, the value of music remains in the live, authentic experience of the artist performing (Firth, 2007).

1.2 The success of live music and festivals

In the 1960's, economists have speculated that live music would be a sector in decline, because it would not be able to compete with mass media entertainment. The prediction was based on the assumption that it could neither achieve the same economies of scale than a concert promoter (costs induced by every single concert vs. one recorded CD duplicated at low cost and sold on multiple markets) nor reach a similar reduction of labor costs i.e. technological advances for recording companies. As a consequence, the researchers argued, prices would stay below inflation for recorded music and concert promoters would have to raise theirs, thus scaring the consumers away (Baumol & Bowen, 1966). This prediction somewhat proved to be wrong. In fact, the live music market doesn't seem to compete with recorded music, but may represent a solution for generating revenue to counterbalance the loss of revenue in record sales, as mentioned in the previous part. In the United Kingdom, the income generated by live performances has surpassed the revenue from record sales in 2008, according to a Mintel report[2]. The traditional balance of bands and artists touring in order to promote their albums has turned into the contrary: albums are rather the support to promote concerts (Larkin, 2006; Conolly & Krueger, 2005). From the consumer's perspective, the music product seems to fade away as the music experience emerges.

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[2] Mentioned by Janice Warman (2010) *How music festivals are singing the changes* [WWW] The Guardian. Available from: http://www.guardian.co.uk/business/2010/aug/27/music-festivals-record-industry [accessed 26/09/2012]

One of the formats which had significant success in the past decades is the festival.

Defining festivals and their characteristics

Originally, the name "festival" was given exclusively to religious celebrations (Pieper, 1965) but over the second half of the 20th century they have expanded to cultural events; films, performing arts, music and wine are a non-exhaustive list of themes. Today, the generally accepted definition of festivals is the purposely simple "themed, public celebration" (Getz, 2005), that is to say that festivals usually specialize on a particular artist (e.g. a series of concerts from Chopin), a particular music genre (e.g. Rock, Electronic, Jazz music etc.) or topic. This type of musical event differs from concerts because "unlike concerts, where individuals are generally drawn to hear and view a live performance of a specific artist, music festivals often involve a myriad of talent and may or may not follow a particular genre" (Bowen & Daniels, 2005). The concept of the festival originated in the 1960's around the world, although the mother of all festivals is considered to be Woodstock, which was held in 1969 near New-York, USA, because of its tremendous success with around half a million people attending it and its sociological significance. The festival-boom occurred in the following decades (Getz, 1991; Crompton & McKay, 1997), during which the number of these events increased dramatically. At the same time, the recording industry began to experience first difficulties. [3]

Festivals seem to be quite resistant to macro-economic factors such as economic downturns (Gesellschaft für Konsumforschung, 2012) as previous research showed the elasticity of demand to be greater than one (Throsby & Withers, 1979, p. 113; Baumol & Baumol, 1984). This can partially be explained by the motivations to attend, this topic being further developed later in the thesis. Concerning ticket prices, these are mostly dependent on the musical content; the more famous artists a festival features, the more it is passed onto ticket prices, because the artist fees are higher and potential customers are more likely to accept higher ticket prices for these Headliners (Leenders et al., 2005).

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[3] Interviews of industry insiders by Jahel Mielke from the newspaper *Tagesspiegel* and the website of the German television channel website *n-tv*, both fully referenced in the bibliography

This event format allows promoters to maximize incomes thanks to economies of scale (one event for several bands dilute fixed costs), attract larger audiences along with selling merchandise and allowing brands to use the event as a channel to communicate with the large audience in a context where they can be more receptive to the brands' message (Frith, 2007). From the artist's point of view, festivals represent an opportunity to play in front of a larger audience as well and gain new fans, which is particularly interesting for lesser known and ambitious bands and artists. The festival as a special event is also interesting for cities which often encourage it because of the positive impact on the local economy and the image of the venue or city (Waterman, 1998, pp. 262; Richards & Wilson, 2004) and are therefore often supported with subsidies. Most of these festivals take place in the summer, for two simple reasons: the weather is more likely to be good, making the experience more enjoyable outside and more people are on holiday at that time of the year, especially when the target is a younger audience.

Marketing festivals in the realm of services marketing

Festival promoters are faced with difficulties which are rooted in the nature of what they are trying to sell. The marketing of festivals is impacted by its belonging to the category of services marketing. Zeithaml, et al. (1985) identify a unique set of characteristics for this type of offer.

The following table shows these features, the resulting marketing problems and how the authors propose to solve them with marketing adaptations:

Service Feature	Resulting Marketing Problem	Strategies to solve problems
<u>Intangibility</u> *As opposed to goods, which are tangible, services "cannot be seen, smelled, tasted, or touched"*	- Services cannot be stored - Services cannot be protected by patents - Services cannot readily display or communicate services - Prices are difficult to set	➔ Emphasize tangible assets ➔ Rather use personal sources than nonpersonal sources ➔ Simulate or stimulate word-of-mouth ➔ Build a strong organizational image ➔ Use cost accounting to set prices ➔ Engage in post purchase communications
<u>Inseparability</u> *Simultaneous production and consumption, the customer must be present at the time of production*	- The consumer is built into the process of value production during the service - Other consumers can be involved in the process of production - Centralized mass production of services difficult	➔ Emphasize selection and training of staff in contact with clients ➔ Manage consumers ➔ Use multisite locations
<u>Heterogeneity</u> *Potential high variability in quality and essence of the service*	- Standardization and quality controls are difficult	➔ Industrialize the service ➔ Customize the service
<u>Perishability</u> *Once the opportunity for selling a service is lost, it is lost forever*	- Services cannot be inventoried	➔ Use strategies to cope with fluctuating demand ➔ Make adjustments in demand and capacity

Table 1: The unique set of characteristics of services and its implications for marketing them (Zeithaml, Parasuraman & Berry, 1985)

To a certain extent, these characteristics can or must be applied to festivals, in order to stage a successful experience. Festivals as an experience are indeed intangible but the communication of festivals is mostly based upon promoting the tangible assets of it: the musical content, which is easier to communicate than the experience itself (Kerrigan, et al., 2004, pp. 187). The principle of inseparability also applies to festivals, a significant part of the value being created by the attendees (see chapter 2.3), as well as perishability. However, the empirical analysis undertaken by the authors concerned a wide variety of companies selling different services and did not specialize in music events, which are entertainment services with high customer involvement (Lyon, 1998). Strategies like industrializing and making adjustments in demand and capacity are difficult to put into place for festivals. The emphasis on training staff in contact with consumers might also be less relevant. Nonetheless, we can conclude that festivals fall into the realm of services marketing.

The marketing of festivals is all the more difficult, that word-of-mouth (WOM) - a phenomenon which lies relatively beyond the control of the event promoter - is the most effective means of spreading a message, getting new clients and securing loyalty (Knauer, 1992; Mangold, et al., 1999; Anderson, 2007, pp. 264).[4] This does not seem to be surprising, because of the social nature of the festival experience (see chapter 2.3).

The other side of the coin: why it is difficult to innovate with new festivals

The other side of the coin is that festivals started to mushroom in the music market. The result of the intensified competition is a destructive price competition and a lack of differentiation, or *excessive sameness* (Van der Wurff & Van Cuilenburg, 2001, cited in Leenders et al., 2005), a tendency also observed in other countries and by other researchers (Lyon, 1998; Quinn, 2006; Morgan, 2006; Richards, 2007; Anderton, 2008), which indicates that festivals are becoming *commoditized*. This "cost-disease" faced by the live music industry represents a significant problem for many promoters. Indeed, only few festivals succeed in establishing themselves over several years, because of rising costs of production, in contrast to a "more or less constant labor productivity in the performing arts" (Frey, 2000, see also Anderton, 2008).

Overall, the barriers for entering the festival industry are rising since fuel costs, artist fees, logistical expenses are rising and the power lies with the established and successful festivals, which are more likely to attract the most famous, *trendy* artists. Moreover, in times of economic slowdown, companies become more and more reluctant to invest their money in sponsoring activities (Atkinson, 2008), all the more when a festival is new on the market. As a result, the promoters have to deal with significant losses the first years of their existence and the race for sponsors is more motivated by a fear of critical losses than by finding a strategic, mutually beneficial partnership. WOM being an effective way of spreading the message (see previous section), one could argue that it should then suffice to stimulate WOM. But this is quite difficult to achieve. Help can come from the media, which can be fueled with information thanks to Public Relations. However, the interest of the media quickly fades, because the novelty effect, by nature, is only true on one year. New festivals can count on the media

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[4] See appendix no. 8 for empirical testing at the New Fall Festival, WOM is the primary answer to the question "how did you learn about the festival?" (22%)

writing about the event on the first year only, after which edition the interest fades. Therefore new festivals have to convince from the first edition on and there is little or no room for mistakes.

The issue of trust also comes into play. The objective for each festival is to get to the point where they are sold out several months in advance and to sell tickets right from the beginning, even though no acts or only few have been published. When such an event has established itself, the tickets get sold because consumers trust the programming of the festival promoters. New festivals first have to earn this trust from the visitors, who may pay somewhat more attention to the actual musical content of the festival.

Even though innovating with new festival concepts appears to be essential in the saturated festival market characterized by too much of the same, it appears that the market is not very welcoming to new entrants; the fact that many festivals don't survive because of the difficulty to get return on investments scares entrepreneurs. Understanding the nature of experiences and the one they provide therefore appears to be important, if festival promoters want to use their creativity in staging an outstanding experience and differentiate themselves from competitors.

2. The experience factor and its relevance for music festivals

Nowadays, one can read the word experience in numerous value propositions of companies and advertising slogans, promises of unique experiences. One can ask the question: what defines an experience? What makes it successful?

2.1 What is experience? A review of the concept

Over the years, several authors have emphasized the importance of the concept and its relevance in business contexts. Although some authors noted that it is still poorly defined (Carù & Cova, 2003; Tynan & McKechnie, 2009), there is a consensus around the fact that consumer experience are subjective and holistic by nature, and based upon the "moments of truth" where a consumer interacts with the offer of a company (Carlzon, 1987; Gentile, et al., 2007; Tynan & McKechnie, 2009, pp. 508) and are subjective, personal (Holbrook & Hirschman, 1984; Carù & Cova, 2003). Despite the holistic nature of an experience, conceptual works indicate that these experiences can be subdivided into separate smaller events (Holbrook & Hirschman, 1982, pp. 96; Schmitt, 1999, pp. 63) e.g. going to an Open Air festival lasting several days includes entering the festival space, being welcomed and provided with information, finding a space for the tent, finding the stages with concerts and so forth.

Extraordinary experiences also appear to be those which are rare, outside the flow of routine experiences in everyday life (Abrahams, 1981; Arnould & Price, 1993) and appeal to the multisensory i.e. sight, smell, touch, hearing and taste (Holbrook & Hirschman, 1982). The concept also implies that the consumer goes through emotional states, whether they are positive e.g. excitement, happiness, euphoria during a concert, or negative at first but later considered positive e.g. unpleasant and challenging incidents (Lee, et al., 1994). During experiences which are consumed collectively, the importance of the shared nature is stressed by numerous researchers as well.[5]

Another aspect mentioned by literature concerns intellectual or educational experiences. Indeed, the so-called *need for cognition[6]* (Cacioppo & Petty, 1982) explains the fact that some activities are engaged with the goal of learning and self-education e.g. when somebody visits a historical exhibition. At last but not at

[5] See chapter 2.3
[6] Defined by the authors as the "tendency to engage in and enjoy thinking"

least, research proved successful experiences to be related to satisfaction coming from service quality (Ralston, et al., 2007). The holistic nature of experience makes it so difficult for researchers to come up with a precise and exhaustive definition of the experience concept. The following illustration sums up the different dimensions of the experience concept:
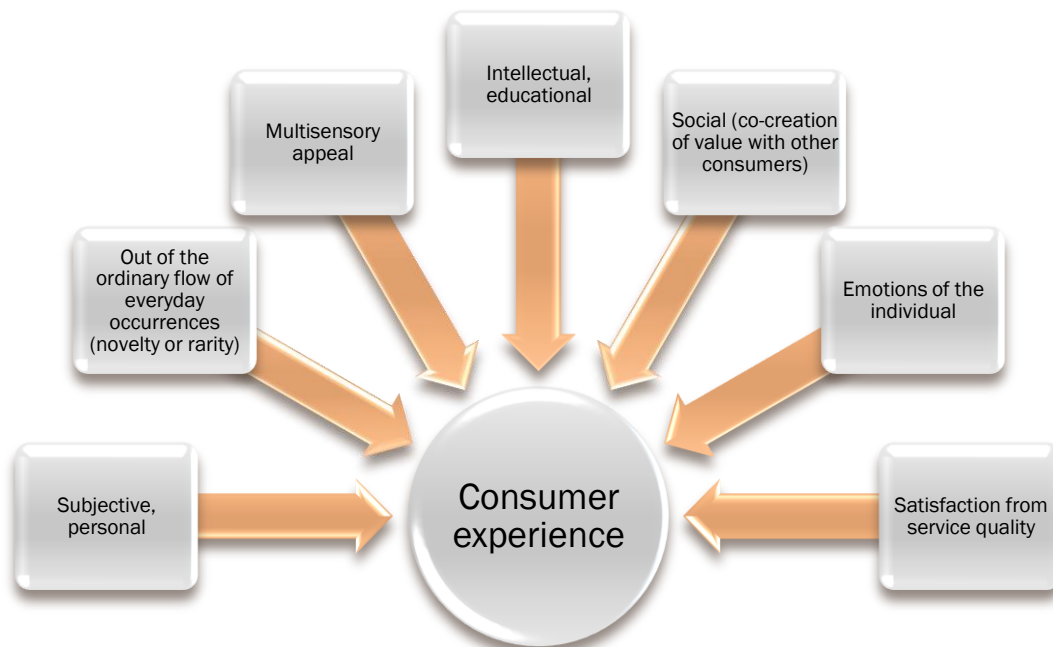
Fig. 3: Different dimensions of the holistic experience concept

Moreover, research showed that the experience of an event does not limit itself to the actual event, it actually occurs before (*upstream*) and after (*downstream*) the event has taken place (Carù & Cova, 2003; Arnould et al., 2004) e.g. the *Vorfreude*[7], the anticipation one feels when a consumer is looking forward to a trip he/she has booked and after the trip the souvenirs he or she brought back extends the actual trip, because it reminds the consumer of it, re-living it.

2.2 The emergence of experience seeking consumers

The sociological perspective

Futurologist Alvin Toffler (1970) predicted almost half a century ago that because of the pace of technological change, people would chase experiences more passionately than they collect objects. Some 20 years later, sociologists made wrote about the phenomenon, which was becoming reality (Köck, 1990; Schulze, 1992; Featherstone, 1991). The authors observe that individuals seek

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[7] The German term Vorfreude fits the context, the literal translation of it being pre-joy.

more and more experiences because of the growing and/or already high life standards, education, free time and technological progress. In this context, hedonic consumption patterns emerge. Also, the sociological perspective considers the aspect of community building through experiences; every individual engaging in an experience becomes part of a group of consumers who engaged in the same activity, forming a *consumer community*[8]. Because of the paradox of choice the consumer is confronted to, so Schulze writes, every experience-consumption represents a statement, it becomes an act of self-affirmation, part of the social identity (see also Williams, 2006 and Gideon D'Arcangelo, 2007).

Pine and Gilmore's pioneering business perspective

From the business perspective, this also represents a fundamental shift; the utilitarian aspect of goods and services fades and gives way to experiential value as predominant factor in the purchasing decision process for individuals (Hirschman, 1984; see also Firat, 2001). Trend-setting authors Pine and Gilmore (1998) describe the phenomenon from the supply perspective (businesses) as the progression of economic value, as shown in the following figure:
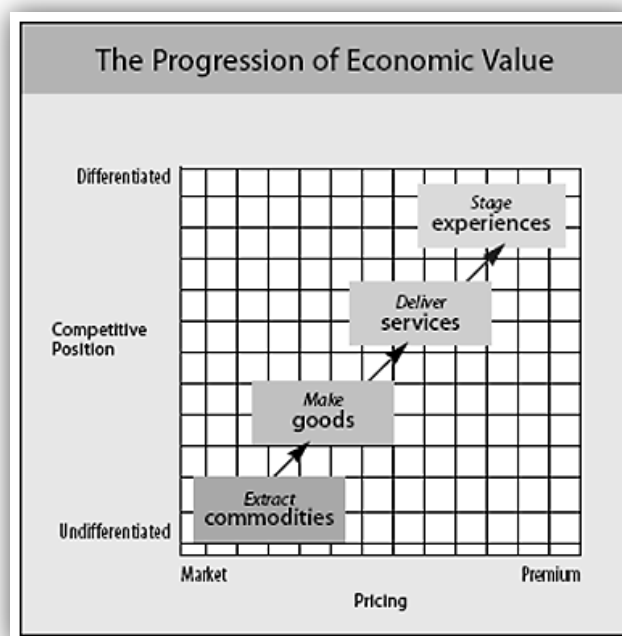
Fig. 4: The progression of economic value (Pine & Gilmore, 1998)

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[8] Translated from the original German term *Konsumgemeinschaft*

Pine & Gilmore's analysis is based upon the more important growth of the entertainment industry compared the ones selling goods and services. This leads them to state that, as once goods, services become commoditized and sold on price. The following illustration shows the distinctions Pine & Gilmore make between commodities, goods, services and experiences:

Economic Distinctions

Economic Offering	Commodities	Goods	Services	Experiences
Economy	Agrarian	Industrial	Service	Experience
Economic Function	Extract	Make	Deliver	Stage
Nature of Offering	Fungible	Tangible	Intangible	Memorable
Key Attribute	Natural	Standardized	Customized	Personal
Method of Supply	Stored in bulk	Inventoried after production	Delivered on demand	Revealed over a duration
Seller	Trader	Manufacturer	Provider	Stager
Buyer	Market	User	Client	Guest
Factors of Demand	Characteristics	Features	Benefits	Sensations

Table 2: Economic distinctions between commodities, goods, services and experiences (Pine & Gilmore, 1998)

As their table above shows, they confirm the previously mentioned nature of experiences, which are staged, mostly rely on sensations, happen over time and are multi-sensory. For them, the experience factor will provide the main source of differentiation for businesses in the future. For commoditized goods and services, price becomes the predominant factor in the purchase decision process and represents the main differentiation factor; price wars start when the goods and/or services are undifferentiated. However, a company is able to charge premium prices, when the offering is highly differentiated i.e. offers a unique and memorable experience (see also Schmitt, 1999). Other authors emphasized the importance of imagination and creativity (innovation) as main differentiation factor (Jensen, 1999; Boswijk et al., 2005).

These works predicting the future importance of the experience concept for gaining competitive advantage led to the emergence of the managerial form: Customer Experience Management (CEM). This holistic business approach captures the attitudes of customers towards a company and manages the interactions between company and customer, combining the effects of the brand, relationships and service quality. A survey carried out by Forrester

Research (cited by Temkin, 2008) illustrates the definite interest of companies in all kinds of business sectors in the customer experience concept. Several tools and frameworks have been developed over the years in order to improve service quality and help implement CEM strategies and improving the customer experience. Without going into too much detail, the following table gives a few examples of these tools and frameworks:

Name of the tool / framework	Principle	Objective(s)
Service Blueprint **(Shostack, 1984)** *The devil is in the details*	The blueprinting process consists in breaking a given service process down in several stages and in a chronological manner e.g. customer enters then welcomed by personnel, searches the cloakroom etc.	The objective is to optimize every step of the service process and identify possible failures and/or possible improvements at every stage of the service offer.
Servicescape **(Booms & Bittner, 1981)**	The servicescape is used when designing or re-designing services, focusing on the impact of the physical environment (light, scent, sounds etc.) and the impact on customers' perception on the service.	Making a difference thanks to *atmospherics*, emphasizing on the impact of the perception of the customers' senses on his/her satisfaction of the service e.g. smooth and non-aggressive lights can lead to relaxation and a better consumption experience in a bar.
Dramaturgical approach **(Grove & Fisk, 1992)** *The service as a theater*	Analogy comparing a service rendered as a theatrical event, with its actors in costumes (staff) performing to form impressions for the audience (customers), scripts (service blueprint)	Create a memorable, immersive and staged experience for the customer.
Experience mapping **(Schmitt, 2003)**	"Graphical representation of the service journey of a customer. It shows their perspective from the beginning, middle and end as they engage a service to achieve their goal, showing the range of tangible and quantitative interactions, triggers and touchpoints, as well as the intangible and qualitative motivations, frustrations and meanings."[9]	Aims at giving a holistic, exhaustive overview of the entire customer experience with its determinants.

Table 3: Overview of frameworks and tools aiming at improving the service quality and customer experience

Now that we have reviewed the existing literature defining the experience concept, we can focus on its relevance or not for music events and festivals in particular, based upon the concepts of hedonistic consumption.

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[9] Defined on: http://desonance.wordpress.com/2010/06/16/customer-experience-mapping

2.3 The (live) music experience

The traditional, rational view of consumer information processing and buying behavior has been challenged some 30 years ago by Holbrook and Hirschman (1982), who enhanced the understanding of consumption theories. They explain that hedonic products and services are those which consumers seek in order to experience emotional states, sensory arousal, feelings and fantasies. Knopf (1988) already noted that the main objective of recreation and leisure offers is to provide outstanding experiences and further research has established that it is in music's nature to be emotional and create emotional experiences, whether it is the mere product one listens to at home, or a live event (Sloboda, 1985; Lacher, 1989; Botti, 2000). Further research labeled this type of service as a *collective hedonic service* (Drengner & Jahn, 2012), which is defined as those which are based upon both a dyadic relationship with the service provider and the interaction between consumers of the event co-creating value for in the shared experience (Drengner, et al., 2012; see also Prahalad & Ramaswamy, 2004; Beard & Ragheb, 1983; Getz, 1997).

A certain number of authors have researched the determinants of festival success. Frey and Busenhart (1996) found out that easy accessibility, exploitation of niche markets (see also Anderson, 2007; Davis & Sankey, 2011; Austin, 2012[10]) and the event's uniqueness were success factors, while Getz (1989; 1991) further named the festive spirit, affordable prices. Leenders, et al. (2005) moderate the assertion that focusing on a niche is essential, showing that festivals with broader focuses can be successful as well. Focusing on a niche just makes success *more likely*. This was showed after an analysis of the role of formats (budget, ticket price, access to the location and having a maximum visitor capacity) and content (scope of the audience, Line Up, established or new festival i.e. age of the event and having a theme) in the Netherlands over a sample of 50 festivals.

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[10] Interviews of experts of the event music sector by the IQ Magazine, fully referenced in the bibliography
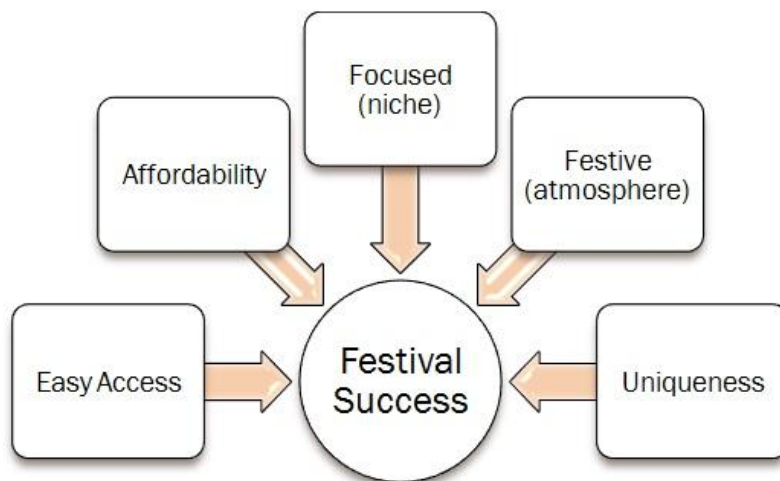
These key success factors show that music events and festivals in particular are *all about experience*, it is the primary value driver. During concerts and festivals, hundreds of cameras are held up in the air by the attendees who want to capture the experience in order to re-live and share the moment after it is consumed. Frith (2007) argues that "according to the much discussed question of authenticity, the live show is the truest form of musical expression, the setting in which musicians and their listeners alike can judge whether what they do is *real*."

Pine and Gilmore's experience framework shows In order to illustrate the previously exposed framework of Pine & Gilmore (1998), Petkus (2004) applied it to the Blackfriars Playhouse Festival, Staunton, Virginia, USA:

Steps in staging experience	Marketing application by Blackfriars Playhouse
1. Develop cohesive theme	—strategic communication of authentic Elizabethan indoor theatre experience —consistent use of advertising tagline 'We do it with the lights on'
2. Forming impressions	—emphasis on communicating historical focus —communicating details of indoor experience (lighting, seating on stage etc) —promotion of 'handmade' elements (chairs, costumes etc) —communicating degree of 'accessible sophistication' —strategic emphasis on authenticity and uniqueness
3. Eliminating distractions	—maintaining 'modern' lobby to emphasise authentic historical aesthetics upon entering theatre —maintaining consistent 'voice' across all marketing communications
4. Providing memorabilia	—sale of wide variety of souvenir items (general Shakespeare items and items specific to Blackfriars)
5. Engaging all senses	—emphasising multidimensional sensory experience (music, visual décor, hardwood benches, lighting etc) in marketing communications —sale of beverages (and allowing consumption in the theatre to promote authenticity)
6. Soliciting feedback	—implementation of audience surveys —encouragement of staff solicitation and reporting of informal feedback

Fig. 6: Characteristics of successful experiences according to Pine & Gilmore (1998) and its application to the Blackfriars Playhouse Festival (Petkus, 2004, pp. 55).

As a conclusion, Getz's (2008, pp. 404) definition of a planned event comes closest to defining festivals in relation to their experiential nature:

> "Planned events are spatial temporal phenomenon, and each is unique because of interactions among the setting, people, and management systems including design elements and the program. Much of the appeal of events is that they are never the same, and you have to "be there" to enjoy the unique experience fully; if you miss it, it's a lost opportunity"

The present chapter proved the relevance of the experience concept for music events and festivals in particular. However, it seems that concert promoters fail to address this and promote the contents of their event more than the benefits which festival visitors actually seek from their experience. The following chapter is dedicated to identifying the motivations for attending festivals and explaining the differences between visitor types.

3. Towards a new typology of festival visitors

In the previous chapters of this thesis, we focused on the developments of the music industry and the value shift from ownership of music towards access to music, in the context of an emerging trend of hedonistic, experience seeking consumer behavior. This development benefits the live music sector, because of the experiential and hedonistic nature of the offer. The underlying assumption is that motivations for attending these events are essentially composed of experiential aspects. However, there seems to be a gap with the marketing strategies of many festivals, which over-emphasize the content of their offer, rather than addressing the (experiential) benefits sought by visitors. In this chapter, we are going to focus on previous research dealing with motivations for attending festivals, the purchase decision process for this collective hedonistic product and the factors involved. Before the empirical analysis of the in-depth interviews, we are also going to explain the assumed differences between the different visitor types.

3.1 Motivations to attend festivals and the decision making process

There has been extensive research about motivation to attend festivals and more specifically music festivals. Analyzing the motivations to attend a musical event is essential to any promoter in order to adapt the marketing strategy (Getz, 1993; McKay & Crompton, 1997; Shone & Perry, 2004). By doing so, it allows marketing to position festivals more precisely and to market it differently according to the different segments (Formica & Uysal, 1998).

Research on motivations to attend festivals

There have been numerous studies examining motivations to attend festivals, to the point where it is one of the most researched topics within the area of festival studies (Getz, 2010). One theory which has largely been confirmed by empirical works is Iso-Ahola's (1982) seeking and escaping theory (developed in section 3.2). The motivations for attending these events are experiential by nature, the motivations standing out of the large majority of these studies being entertainment, diversion, socializing, learning, novelty seeking and escape (Getz, 2008, pp. 416), indicating that it is a core set of motivations. However, the links and relative importance of these factors between each other vary from event to event, as Nicholson and Pearce's (2001) analysis of different festival products

shows i.e. highly dependent on the festival content. This explains why there are so many studies of festival motivations, since they vary strongly between event types. A study comparing the motivations of six different festival products (symphony, rock, world music, dance, ballet, and theater) showed significant differences between the relative importance of the motivations, for example the family togetherness motivation was less important for the rock festival attendees (Yolal, et al., 2012). However, even if the proportions vary between events, the core set of motivation remains.

The decision making process of festival visitors

According to Kardes, et al., (2008, pp. 8) "Consumer behavior entails all consumer activities associated with the purchase, use and disposal of goods and services, including the consumer's emotional, mental, and behavioral responses that proceed, determine, or follow these activities." This definition indicates that there are many different factors coming into play during a purchase decision, especially when it is coupled with the complex concept of experience. The traditional decision making model implies that a problem that has to be solved, a need which has to be fulfilled (Peter & Olson, 2008). However, this process doesn't seem to be appropriate for festivals, which are of hedonistic nature i.e. the consumption of the product is the goal in itself, a phenomenon also referred to as *expressive consumption* (Sundbo, 2009). Hedonism is closely related to impulsivity but one could argue that buying festival tickets several months in advance is not an impulsive, rather a planned behavior (Kruger, et al., 2011, see planning vs. spontaneous visitors). There are multiple factors influencing the purchase-decision for festival tickets, which we are going to develop.

Factors coming into play

Planning vs. spontaneous visitors or tourists vs. locals

Previous research proved festivals to be closely connected to tourism (Getz, 1989). The more a festival establishes itself over the years, the more it attracts visitors from further away wanting to participate in the extraordinary cultural event, which led Börsch-Supan (1993) to compare it to pilgrimages. A study conducted at the Klein Karoo National Arts Festival (Kruger, et al., 2011), which aimed at finding out when the best moment for promoting a festival is, divided the attendees in two separate segments. *Planners* (those who bought their

ticket over one month in advance) spent more time at the festival, spent more, were rather loyal visitors who had already attended the event in the past and were coming from further away than spontaneous visitors (rather locals). They concluded that a marketing campaign for festivals should consider that difference between the two segments, promoting the festival program 3 to 4 months in advance and promote rather locally in the last month before the event.

Logically, visitors who travel from further away to the festival location can be considered as planning visitors, because they have to make the necessary arrangements in order to attend the event. The distance to the festival site therefore plays a role in the decision making process.

The individual's preferences

As we pointed out earlier, musical festivals are themed often focus on a particular theme and/or music genre because they take into account the preferences of specific target groups e.g. A jazz fan will be attracted by a festival which features jazz artists. The musical taste can play the role of a mediating variable.

Time and money

Holbrook & Hirschman (1982, pp. 137) argue that "Entertainment-, arts- and leisure-related offerings often depend more of the allocation of time and money." The analysis of key success factors for festivals confirmed the relevance of the price factor.

Other factors

Some other factors come into play when deciding to attend festivals. **The dates** of the festival are an important factor, because people compare the dates of the festival with their own schedules. Festivals react to this by adapting the dates (Leenders, et al., 2005) where the event is held, organizing them during periods where the targets are more likely to have leisure time e.g. as mentioned earlier, the majority of festivals are held in summer, because many of the potential attendees will be on vacation, especially for festivals with younger audiences on summer vacation at that time of the year. The **social factor** also plays an essential part in a successful festival experience (attending the event with family and/or friends).

The decision making for attending a festival can be illustrated as follows:
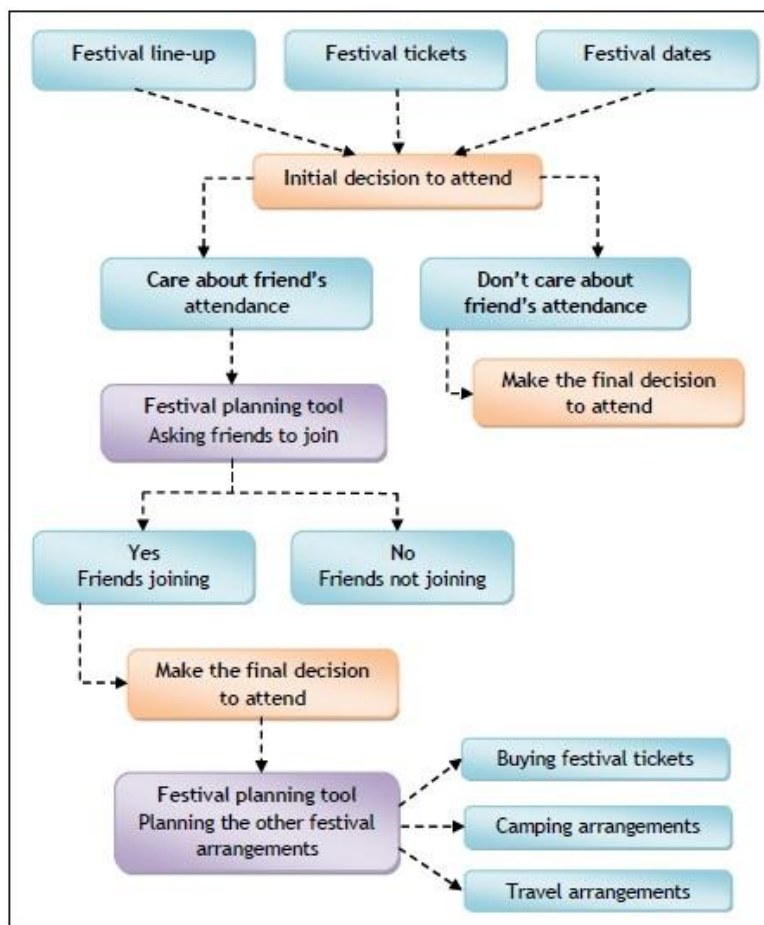
Fig. 7: Decision making model for attending a festival (Noman, 2012)

We can notice that the person who is interested in such an event has several barriers to overcome, especially if he or she lives further away from the location where it is held.

Illustration of the decision making process

Let's illustrate the decision-making process with an example. Consider Jack, student and heavy metal fan. Jack saw a promotional poster of the festival on the streets and several acquaintances recommended the event. First, he goes on the website of the festival to get more information concerning the Line Up, dates, venues and location of the event and ticket prices. Subsequently, he asks several friends or family members if they would join. If someone joins him, he is willing to pay the higher price for it even if his budget is limited, but not if nobody does. Moreover the festival is quite far away and requires some planning, which is *no fun* alone. However, Jack is very attracted by it, because he/she has

already been to similar festivals and felt that the experience was very positive and quite extraordinary.

Eventually, he finds two friends who are willing to join. One of these friends is not particularly a fan of the music genre but is willing to try out this new experience and the other one is a big fan of some of the bands in the Line Up. The first one accepts to the condition that they share expenses and he found the event to be attractive in its experience design but the second one had this event on his calendar since a long time, because he absolutely wants to see his favorite bands live. He has heard of the event before as well and knows the festival concept, but it does not really matter to him, because he would have gone to another festival to see the particular bands - he is a fan of - play.

3.2 Towards a new typology of festival visitors

Fans and adventurers

Voerhoef et al. (2009) have developed a model of determinants of customer experience in the retail environment and observed task oriented customers versus experientially oriented ones. Does such also apply for music events, festivals in particular? According to a study conducted at the Wireless Festival (Henderson & Wood, 2012) it does. The researchers studied the different motivations of attendees of two different festival days during which the programming was directed at different segments, the music genre being different. The study reveals that the differentiation between content-motivated visitors and the "other social socialites who seek an experience beyond the music" is relevant for adapting marketing actions and the experience design. Furthermore, Nicholson & Pearce's research (2001) pointed out that the largest part of event attendees is composed of visitors who are rather motivated by what it has to offer than by the experience in itself.

A widely accepted theory related to this problem is the theory regarding "push" and "pull" factors (Crompton, 1979; Dann, 1981; Iso-Ahola, 1982). The following illustration shows what is meant by those factors:
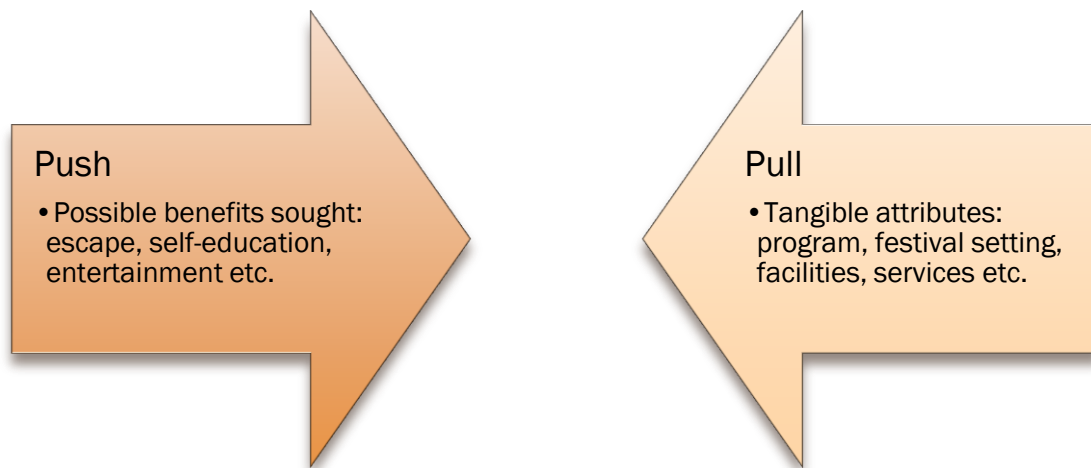
These push and pull factors are part of the explanation for the differentiation between experience-motivated and content-motivated customers. Most festivals focus on the pull factors, putting forward the tangible assets of their offer, forgetting to stress the push factors and leaving it to word-of-mouth, which is hardly – if ever – controllable.

A possible hybrid category: conditional adventurers

The previous differentiation between Fans and adventurers raises the question of the dependence of a festival on its actual program or content. Are the festival content and the experience design two separate factors, as the push and pull factor theory suggests? Morgan (2006) examined what visitors think make a good festival and pointed out that festival-goers got more pleasure out of discovering something new than to see what they came for. Sharing the experience with other people was also found to be an essential factor, as well as the local distinctiveness i.e. the uniqueness of the event because of its location. He also points out the holistic view of festival visitors, inherent to the nature of experiences. This leads us to assume that some visitors belong to a mixed category. That is to say that these visitors only attend the event, if the experience design is attractive to them, but also on condition that the festival content fits their personal preferences (the music genre is "their type of music).

The motivations to attend festivals are essentially experiential for the three visitor categories. The difference lies within the nuance that the fans attend the event *on condition* that they know the bands performing at the event whereas adventurers go to the event with the primary motivation of seeking novelty, discovering a new musical experience while also discovering bands they don't

know. Therefore the mediating variable of program knowledge/familiarity comes into play between those two categories. The third, hybrid category which we can call conditional adventurers only attends the event if both conditions – attractiveness of the experience design and the content fits his/her musical taste – are fulfilled.

Key assumptions from the literature review

The literature review allowed us to understand why the experience factor is not only relevant in the new music business because of the abundance and of the music product, but also essential for new festivals who are entering a highly competitive market, which lacks innovative experience designs. It was also necessary to gain an understanding of what the customer experience is shaped from and to compare it to the motivations to attend music events and festivals in particular. The over-emphasis festival promoters put on the musical content, due to the nature of what they are trying to sell, uncovered a gap with regard to what consumers actually seek when attending a festival: an outstanding, memorable experience. Eventually, it allowed us to separate experience-driven festival visitors from those whose primary motivation to attend is the pure content, the program of the festival and those who seek both. Eventually, this differentiation comes down to asking the question: would the festival-goer have attended the event in the "usual" experience design? If the answer is no, the visitor can be considered an adventurer and if the answer is yes, he is rather content-driven: a fan. A third, hybrid category emerged; the conditional adventurer.

The following table summarizes the assumptions we can draw from the literature review concerning the three identified categories:

Characteristic	Fans	Conditional adventurers	Adventurers
Importance of the content (program)	Most important factor, the attention and purchase was triggered by the content	Important mediating factor. As long as the content fits the individual's preferences (right musical genre), the visitor considers attending.	Not important, the attention and purchase was triggered by the experience itself, its novelty and creativity.
Importance of the experience novelty / type of experience design	It adds value for the visitor but it doesn't represent the primary motivation for purchasing the ticket, it may lead to a readiness to pay a higher price	These visitors consider it as a necessary condition to their attendance, the experience design / festival concept has to attract them	Experience novelty fades over time when it has been consumed several times, discovery factor fades
Moment of the ticket purchase	Early (at least one month before the event) This visitor plans in advance and adds the event to his/her schedule with the fix intention to attend	Uncertain	Late not more than 3, 4 weeks before the event, because of the spontaneity of the purchase
Willingness to overcome barriers (price, distance, social factor etc.)	Most likely	Somewhat likely if they don't consider these barriers to be very hard to overcome	Not willing to overcome barriers or if they consider them to be easy to overcome

Table 4: Assumed characteristics of content-motivated vs. experience-motivated festival visitors drawn from the literature review.

This typology is going to be tested in the following part of the thesis, thanks to an exploratory research carried out in the context of a festival with an innovative experience design, which took place in the fall of 2012 in Germany.

Empirical Analysis

This second part of the thesis is dedicated to an empirical analysis conducted in the context of the New Fall Festival 2012, which took place in Düsseldorf, Germany from the 3rd to the 7th of October 2012.

In 2011 the Bundesverband für Veranstaltungswirtschaft (BDV) – the Federal German Association for the Promoters and Event Business - commissioned an industry report[11] and estimated the live music market size to almost € 2.8 billion. Compared to the year 2009, the sales volume grew by an impressive 22%. This is explained by both the higher ticket prices (+ 9%) but more importantly the rising interest of German music lovers in live performances (+ 3% rise in the number of ticket buyers) who attend in average 3,1 music events per year. The number of festivals taking place in Germany each year is estimated to approach the 1.000 events, most of which take place in the months of June, July and August. In 2011, the business volume of festivals amounted to €341 million which represents a 35% increase compared to the year 2009, despite an average 45% increase of ticket prices.

Therefore, the industry seems to be in a good shape. However, it becomes more and more difficult for new festivals to grab the attention of consumers in the festival-jungle, as music fans are exposed to the paradox of choice.

An example of an innovative experience design: the New Fall Festival

The novelty of the experience setting lies in the locations – the Robert-Schumann-Saal and the Tonhalle[12] - in Düsseldorf, two premium venues which usually host classical concerts and the experience design is different from what the audience of this music genre is used to i.e. regular concerts in multi-purpose halls or Open Air festivals. In his working paper from 2000, Frey highlighted that "a large share of the population rarely, if ever, attends cultural events in opera houses" and large, popular festivals are held in public places which are more likely to attract a maximum audience size such as stadiums, fields out of town and places outside (so-called Open Air). The New Fall Festival is supported by the staff and service of the venues, which provide services like cloakrooms,

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[11] Bundesverband für Veranstaltungswirtschaft (2012), *Konsumstudie des Veranstaltungsmarktes i.J. 2011*, [WWW] figures partially available at: http://www.veranstaltungswirtschaft.de/en_sector_studies [accessed 10/09/2012]
[12] See appendices no. 1 and 2

rather premium catering and doormen, which gives an *opera-like* atmosphere. This challenges more conventional concert formats, making the bet that these two worlds crashing offers a distinctive experience despite the old-fashioned – yet charming - image the venues have.

Note about the ticketing structure

At this point it also appears essential to detail the ticketing structure put in place by the event promoters, because it concerns the price factor which can represent one barrier for potential visitors. The festival visitors have the choice between two alternatives; either they buy one or several tickets for each concert night (one per day and per venue) for prices ranging from €25 to €30 plus additional fees issued by the ticket distributor, or they buy a *Kombiticket*, which allows the visitor to attend three concerts of his choice for a price of €75,90 i.e. €25,30 per concert with only one time the additional fee. This ticketing structure encourages visitors to be adventurous.

This out-of-the-ordinary festival serves as investigative field for the empirical part of the thesis, which intends to test the new typology for festival visitors.

1. Methodology

The empirical part of the paper focuses on testing this typology of festival visitors. First of all, we are going to specify which research design has been adopted as well as the sampling and data collection method which was decided upon and the content of the research.

1.1 Research design and investigative field

Since this typology of festival visitors has never been identified nor defined, an exploratory research design has been adopted, being more likely to provide insights than quantitative methods (The Higher Education Academy, 2007). Moreover, the in depth interviews were preferred in order to avoid the "me-too-effect" focus groups can have. For instance, when asking about the importance of being accompanied for an event, the first respondent could answer that it is very important to him and the other ones say exactly the same thing although they would have moderated their statement during a face-to-face interview. The downside of this method is that the group dynamic which can be positive to stimulate respondents is absent. It was also easier to agree upon the time and date of the in depth interview, which would have been more difficult when all the availabilities of all respondents had to be compared and negotiated.

The promoter of the event, the SSC Group, wanted to gather data for their marketing activities related to the festival, therefore they developed a questionnaire.[13] These questions concerned multiple topics e.g. which ticket service was used, when the visitors bought their tickets, service quality etc. At the end of the questionnaire, the visitors could give their contact details to participate in the present study. An incentive was offered: those who would be selected and then participate would get a festival ticket for the next edition as well as a festival T-shirt 2012. The festival ticket represents an entry for 3 concert nights with a total value of €75,90. The total number of interviews could not exceed 9 because of what the company was willing to invest in the incentives offered, these 9 festival tickets already representing an amount of €683.

[13] The complete questionnaire is attached, appendix no.2

1.2 Sampling frame sampling method

The population considered in order to conduct the research has been limited to the New Fall Festival visitors.

A major concern was not to deteriorate the consumption experience during the festival, as customers could be "annoyed" by the questionnaires. Therefore, the best "compromise" was to put an incentive in place. During the breaks between the support band and the headliner, as well as after the concerts, people coming to the merchandising stand were asked to fill out the survey in exchange for a free, very popular promotional poster in A0 Format. One question in the survey was related to the reason for attending the event and it was asked that the respondents "classify" themselves as one of the following:

- Adventurous i.e. I am not a particular fan or follower of the band or artist, but the new festival experience made me curious.
- Interested by the genre i.e. I am not a particular fan of the band or artist, but it corresponds to my music tastes and I was attracted to the festival concept.
- Fan i.e. I am a regular follower of the band.
- Passionate fan i.e. I am a passionate fan of the band or artist and I would not miss a performance taking place nearby.

The survey was completed by 208 people, representing 4,68% of the total number of festival visitors. Within this sample, 90 visitors agreed to participate in the survey. It thus allowed us to select 3 "members" of each category among the pool of participants. The two categories *fans* and *passionate fans* were eventually put into one and the same category because they can be considered as being essentially content-oriented; only the degree to which they are, the intensity varies[14]. Moreover, the survey asked the question when the visitors bought their tickets or if they won them via a lottery or if they were on the guest list. This question allowed to filter the participants, selecting those who bought tickets, because it shows which visitors were not only ready to attend the event, but also to pay for it, the buying intention being important in the present thesis, since it explores if visitors intend to pay for the experience.

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[14] The visitor who sees himself more as a « fan or follower » than a « passionate or big fan" of the band is more likely to be interested by the experience design of the event, while the passionate fan would attend the concert, no matter the experience-design.

1.3 Data collection

In order to measure the experience on a more long-term basis, it was important to let the experience "sink in" and evaluate the perceived experience after a certain laps of time because it measures attitudes more accurately. One example for this is the person who goes to the hairdresser and comes out, not knowing what to think about the new haircut, the customer is more likely to judge accurately what he or she thinks of it after a certain lapse of time. Thus, the interviews were conducted at least 2 weeks after the event, so that visitors could reflect on the experience.

These interviews always took place in a neutral setting / context and the candidates were ensured, that the interview was totally anonymous, so they could talk freely, their name wouldn't appear in any document nor be transmitted to the company. A total number of 9 semi-structured interviews were conducted between the 15th of October and the 3rd of November 2012. These in depth interviews lasted between 30 – 45 minutes, depending on the answers of the respondents.

1.4 Structure of the qualitative research

Topic guide of the interviews
The objective of the qualitative research that has been undertaken was to find common patterns between the visitor types in order to confirm the typology. Therefore, a range of factors have been chosen to form the guidelines:
- o What triggered the interest of the participants in the festival? (Line Up? Experience? Both?)
- o Their perception of the event (was it an outstanding experience?)
- o Their intention to return and under which conditions they would do so
- o The perceived price
- o Importance of the dates
- o Importance of being accompanied
- o Willingness to travel

Eventually, based on the idea that the trigger to attend the event is different according to the respective categories, a concrete application of different communication alternatives was carried out.

At the end of the in depth interview, three promotional posters were shown to the participants. The first poster could be called "content-led" and promotes the festival content; it was the actual promotional poster of the NFF which was used. The second one is includes the value proposition or slogan (Transl. *special places, special bands*) of the event and one of the two locations as a background, so it can be considered as a mix between content-led and experience-led promotion, because it also includes the content, that is to say the Line Up of the festival. The third and last poster only shows a slogan summing up the festival philosophy with the location as a background and at the bottom the names of the locations are shown. The difference with the two other posters is that it can be considered a purely experience-driven poster, since there is no mention of the actual musical content of the festival.

The objective was to find out whether or not the different visitor types react differently to the different posters which differ in their composition, assuming that adventurers would rather be attracted by posters with content relating to the festival experience and would prefer the poster focusing on the content.

Fig. 9: The three posters shown to the participants of the in depth interviews

2. Data analysis

The data collected during the in-depth interviews is going to be analyzed in the following section. In order to test the relevance of the visitor typology, we are going to group the visitors in their respective categories as common characteristics will be easier to point out. Nonetheless, the responses given by each respondent will be pointed out on an individual level as well.

2.1 Analysis of the in-depth interviews

Profiles of the participants

Respondent	Age and status	Frequency of music event attendance per year	Number of concerts attended at the NFF	Distance from home to the event location (at the time of the NFF)
Adventurer 1	47 yrs (employed)	5-6 concerts 1 festival every 2-3 years	2	Same city
Adventurer 2	24 yrs (student)	started recently under the influence of boyfriend 10 concerts 1-2 festivals	3 (Kombiticket)	450 Kms
Adventurer 3	56 yrs (self-employed)	5 concerts 1 festival every 2 years (classical)	1	Same city
ConAdv 1	26 yrs (student)	25-30 concerts 3-4 festivals	3 (Kombiticket)	30 Kms
ConAdv 2	30 yrs (employed)	30 concerts 1 or 2 festivals	2	Same city
ConAdv 3	28 yrs (employed)	40 concerts 1 or 2 festivals	3 (Kombiticket)	Same city
Fan 1	28 yrs (employed)	30-40 concerts 1 festival	3 (Kombiticket)	30 Kms, but works in the same city
Fan 2	38 yrs (employed)	40 concerts No festivals	1	30 Kms
Fan 3	20 yrs (employed)	20-25 concerts 1-2 festivals	1	500 Kms
Categories	Adventurer	ConAdv: Conditional adventurer		Fan

Table 5: Profiles of the persons interviewed

The profiles of the interviewees do not really allow us to draw conclusions; this type of data should rather be collected in a quantitative research design for it to be conclusive and generalizable. Nonetheless, we can note that, among our interviewees, the fans of the bands did not live in the same city than the festival location, whereas the adventurers and conditional adventurers mostly did; the 450 kms traveled by our adventurer no. 2 are to be moderated, since her boyfriend lived in the same city than the festival location and she combined the visit of both festival and boyfriend. Fan 3 traveled 500 kms in order to see the

band perform. Also, the adventurous types visited less concerts and festivals per year than the other respondents.

In-depth interviews

The respondents of the interviewees can be represented in a tabular form, which makes it easier to find patterns.

Attention triggers and conditions under which the visitors would return:

Respondent	Attention trigger (content / concept)	Conditions to return / sustainability of the concept
Adventurer 1	Had heard of one of the bands but the **locations triggered her attention**, since these venues are known to host classical concerts, not the musical genre of the NFF - More interested in the concepts of the events in general	**Important to know at least one of the bands in the Line Up**, then she became adventurous, wanting to see other bands and both venues
Adventurer 2	**Mostly interested by the concept**, influenced by the recommendation of her boyfriend.	**Social factor decisive**, she probably would not come back without her boyfriend. - **Locations make it still attractive even after novelty is gone** after attending for the first time - **Would wait for bands to be announced** in order to listen to their music before buying a ticket
Adventurer 3	**Festival concept unusual** for the location	Not sure but **likely depending on the music**
ConAdv 1	"It is a **mix really of the bands which I found interesting and the setting**" - **Would not have gone in a multi-purpose hall** - If he had seen a band perform a few months before, he would go back to see them at the NFF, not in a regular setting	**Depending on the bands, at least knowing them is important** - "I don't think you become tired of the concept [...] because when you attend a lot of concerts in regular settings, having the NFF once a year will be a different experience all over again"
ConAdv 2	Two elements came together, concept and content - **Would not have attended in a regular concert-hall** even though she knew the band - "I am very selective in the type of events I go to, the concept plays a primordial role"	Unusual experience, charming because of its character - **Bands arrange their songs** to fit the locations, which makes it out of the ordinary - After having attended two editions, she now **trusts the programming of the promoters**
ConAdv 3	**What attracted him first were the bands performing** (triggered interest) but the **event concept convinced him to go** in 2011. -	Even after two editions, the NFF is still different from other event formats, which makes it still attractive -

	Would not have gone to a concert of in a regular concert hall	**When on his own**, the content is decisive
Fan 1	Fan of two of the bands in the Line Up - Would have gone in a regular concert setting if not far away	Knowing the bands in the Line Up, **then she is sure to return**, not so sure if she doesn't know them
Fan 2	Attention gets triggered when seeing a familiar name, "less spontaneous, the Band has to fit my taste" - Would not have attended in a regular concert hall	**Dependent on the content,** the bands playing have to be attractive
Fan 3	Most important factor is the content (knowing the bands of the Line Up) - Concept adds value	**Dependent on the bands**

Table 6: Tabular analysis of the in depth interviews (1)

This first analysis of the answers shows that all of the adventurers and conditional adventurers cite the festival concept as the primary reason for their interest and attendance. The fans were attracted by the content of the festival. However one of them states that he would not have attended the concert in a regular multi-purpose hall. We can also note that the fans mention the importance of the experience design, which adds value to the concert of the artists they came to see.

When looking at the conditions in which they would attend concerts of this festival again, the answers are less clear. 8 out of the 9 respondents stated that they would wait for bands to be announced before deciding whether to re-purchase a ticket or not. Only on visitor mentioned that she trusted the festival enough to buy her ticket in advance.

Aspects involved in the purchase decision process

Respondent	Price	Time / dates	Socializing (would have gone alone?)	Willingness to travel
Adventurer 1	Willing to invest in new experiences and pay a little more for it - "not as price-focused as students might be"	/	Went with a friend for the discovery factor	If far away, only accompanied - If she had the choice between seeing a band in a regular format closer from home and seeing them in an unusual format a little

				further away, she would have travelled (not too far away)
Adventurer 2	**Price is high for her (student) but she made this investment because of her enthusiastic boyfriend**, who values the experience	If other things are planned, **she won't arrange her schedule in order to attend**	**Would not consider going alone**, being accompanied is primordial	Willing to travel further away **if accompanied**
Adventurer 3	**Not price-sensitive**	**Important variable** Would not cancel something else in order to attend	**Would not go alone**	**No**
ConAdv 1	**Not too high because of the added value** coming from the festival concept (premium locations)	**NFF makes it easy to attend** even if one has to work on the day after	**Would have gone alone because he considered it to be close to his home** - For a unique festival he doesn't mind trying it out alone	**Only if he has friends or family coming with him** if it is further away
ConAdv 2	**Quite expensive but worth paying for** because of the festival's **uniqueness** - **Kombiticket good deal** because envourages to discover other bands	**Important, depending on the calendar**, if she has to work or not	Went with friends but would **probably also have attended alone (hesitation)** - **Attending with friends is very important**, even if not necessarily prohibitive - Would **not go alone for a band she doesn't know**	**Yes if a fan of the band(s) in the Line Up, otherwise not**
ConAdv 3	Price is ok compared, very much aligned with other concert prices - **Locations make it worth paying a little more**	**Important**	**Would not have gone alone**	**Yes, only if the content of the event is right and friends join him**
Fan 1	No problem, "if I absolutely want to see a band	**I often plan in advance** in order to see my	**Went alone** to concert, regretting not to	**Local is better** (but not necessary)

	play, I **can pay a little more!**"	favorite bands play	be accompanied but not prohibitive	especially if she doesn't really know the band
Fan 2	**NFF important added value** for a price aligned with the ones of other concerts	**Important**, especially if he has to work on the day after	**Yes** - **No for a band he doesn't know**	If the festival concept is good
Fan 3	**Price did not matter much**	Willing to arrange her schedule to see the band perform	**Would also have gone alone**	**Yes**, travelled 450 Kms

Table 7: Tabular analysis of the in depth interviews (2)

By looking at the table considering the factors involved in the purchase decision, some patterns emerge:

- None of the participants appears to be very price-sensitive in relation to the festival concept, either because of their employment status (see profiles) or because of the festival concept which adds value.

- Two of the three fans questioned appear to be willing to arrange their schedule or plan in advance in order to see their favorite bands play on a concert. The adventurers and conditional adventurers consider the dates to be important, they would not necessarily sacrifice other plans.

- The social factor seems to play a particularly important role for the adventurers who want their experience to be shared whereas 2 of the three fans went alone to the concert. The conditional adventurers have different point of views on the matter.

- The fans also reveal themselves to be more willing to travel for their favorite bands than the other visitors, who either would not or under the condition of being accompanied by friends and/or family.

Several participants pointed out that the *Kombiticket* made it easier to become adventurous and to go see bands which they did not know at all. The participants did not go to respectively only one concert, but several, and depending on the concert, they switched categories. The example below illustrates this statement with the visitor we are labeled Fan 1:

Respondent	Concert 1	Concert 2	Concert 3
Fan 1	Get Well Soon	Ewert & the Two Dragons	Tindersticks
Relation to the content	Fan	Fan	Adventurous

Therefore, we can consider these categories to be rather liquid and highly dependent on the program of the festival.

2.2 Analysis of the practical application

Respondent	Preferred poster	Reason / justification
Adventurer 1	3 – Experience-led	**Location is included in the poster** and for the content she would get information on the website and listen to the bands at the same time. If she had not known one of the bands in the Line Up when seeing the poster which was used for promotion **(poster 1), it wouldn't have triggered her interest**, even if the festival concept later proved to be attractive to her.
Adventurer 2	2 – Mixed	**The content-led poster doesn't communicate "what's special about the festival**." However, **the poster without any information about the musical content lacks reference points** for her.
Adventurer 3	2 – Mixed poster	**Concept is more present in the mixed poster**, the content-led poster would not have attracted him at all because the music genre does not appeal to him at all.
Conditional Adventurer 1	1 - Content-led	Because he **already knew the concept** of the festival and when he saw the name of the poster, he knew which experience to expect. The content allows him to see if the musical genre fits him.
Conditional Adventurer 2	1 – Content-led	The **content is a condition to attending the event**, it has to fit her musical taste. But the **first element which triggers her attention is the content** and she then takes a closer look herself (on the web) to decide if the concept attracts her as well.
Conditional Adventurer 3	1 – Content-led and mixed	Since he **knows the festival concept**, he would prefer the poster with only the content. However, he thinks that the **mixed poster would be best for people who don't know the festival concept**.
Fan 1	1 – Content-led	Since she knows the bands of the concerts she attended, the **names attract her attention the most**. However, she says that the mixed poster is good too, because it includes aspects of the festival concept.
Fan 2	2 – Mixed	Location is attractive and serves as an argument for the festival, it adds up to the program. The **location could make a difference for fans as well** e.g. when having the choice between seeing the band in a multi-purpose hall and at the NFF.
Fan 3	1 – Content-led	Slogan is not necessary on the two other posters because it is implied by the content-led poster. Mixed-poster interesting as well for people who don't know the bands, because it shows the location.

Table 8: Analysis of the practical application (posters)

Out of the 9 respondents, 4 picked the content-led poster as the best promotional poster, 4 picked the mixed poster and only one participant picked the experience-led poster without the Line Up. None of the adventurers chose

the content-led poster, because it does not communicate the value proposition, the uniqueness of the festival at first sight, it is only implied (under the condition of knowing the venues) by the locations being displayed.

Among the conditional adventurers and the fans, only one did not pick the content-led poster. This can be explained by the fact that the musical content at least as important as the experience design for these visitors, therefore they need tangible elements concerning the musical identity of the event to be included, in order to assess if they would attend or not. In this practical application, the fact that some of the visitors already knew the concept of the festival before and integrated the experience design in the brand *New Fall Festival* explains why they did not feel the need to be informed about it on the poster; they point out that when they see the poster, they already know the concept and therefore they are only interested by the content at this point.

2.3 Analysis of available quantitative data

Although this thesis is based upon a qualitative research method, the opportunity to use some of the quantitative data relevant to the research question represented an opportunity to draw first conclusions as to the characteristics of the different visitor categories. It would have been a shame not to seize this opportunity.

Sample sizes
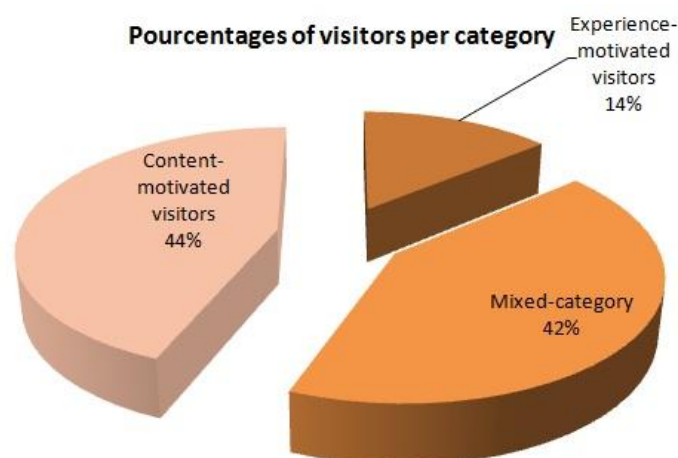
Fig. 10: Sample sizes considering all respondents.

From the 208 persons who participated in the company survey, 14% of the participants put themselves in the *experience-motivated* (adventurers) category. The sizes of the two other samples (content-motivated i.e. fans and mixed i.e. conditional adventurers) is similar with respectively 44% and 42%. This can seem astonishing, since one could think than the fans of the artist/band performing composes the majority of the audience. In fact they seem to represent less than half of it. However, a significant difference exists when considering paying vs. non-paying visitors (guests, journalists etc.).

Pourcentages in non-paying visitors
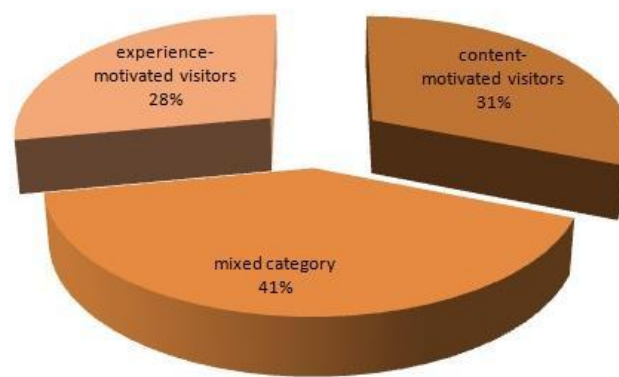
Fig. 11: Sample sizes considering only non-paying visitors

Pourcentages in paying visitors
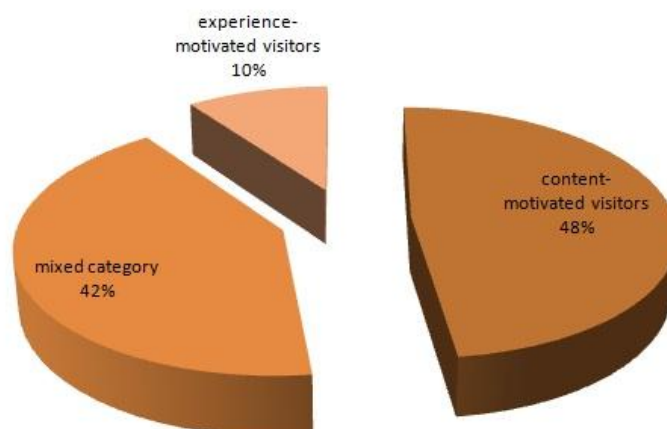
Fig. 12: Sample sizes considering only paying visitors

Among the paying visitors this category represented only 10%, whereas it represented 28% of non-paying visitors, which can be explained by the fact that it is much easier to be adventurous and take risks, when one does not have to pay for it. The other difference concerns the content-motivated category (fans) which represents almost half of the paying visitors, whereas they are "only" 31% of non-paying visitors. This could be explained by the fact that these fans bought their ticket further in advance. When the concert promoter realized that the concert was not going to be sold out, he decided to promote additionally to the posters via lotteries for the media and blogs (so that they would promote the event by mentioning the lottery) and this may explain the quite high number of non-paying fans.

Moment of ticket purchase

Thanks to the survey distributed at the event, it was also possible to analyze at which moment the different visitor categories respectively bought their tickets. The following graph compares the total number of tickets sold by category with the moment of the ticket purchase:
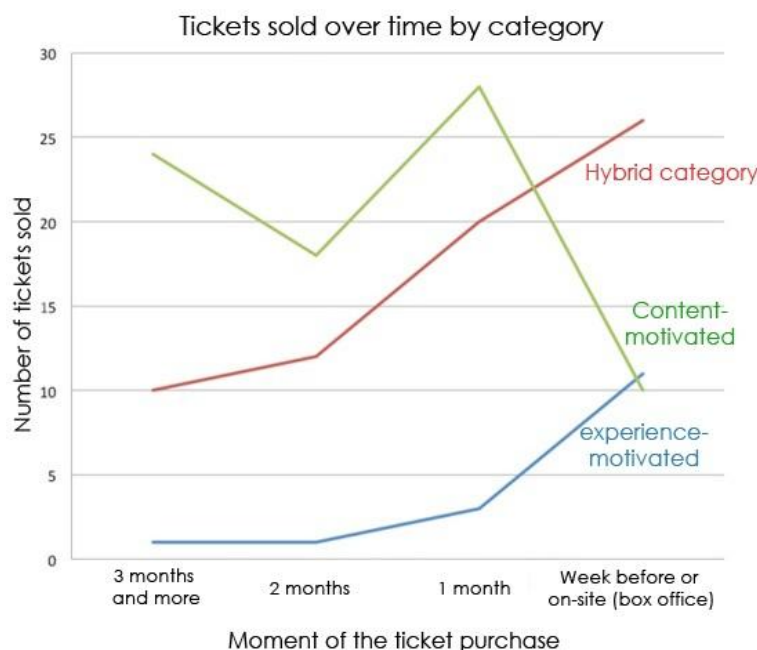
Fig. 13: Tickets sold over time by visitor category

We can notice that content-motivated festival visitors tend to buy their tickets earlier (over one month before the event) and experience-motivated festival goers later (one month before the event and later). The visitors who put themselves in the hybrid category follow the general trend of ticket sales, which is exponential over time.

3. Findings

3.1 Findings from the qualitative data analysis

Relevance of the different categories

First of all, the emergence of patterns between participants according to their respective categories confirms the relevance of the typology based on a differentiation between content of the festival and its experience design. However, it is important to moderate this distinction. One and the same visitor can be part of the adventurer category for one concert and become part of the fans for another concert. This also works the other way around, as we found out; some fans of bands became adventurous because the relative ticket price for a third concert decreased with the ticket package offered. Nonetheless, even though it changes every time the content changes, it appears that the audience is composed of those three categories in an innovative experience design: those who were more attracted by the concept and adventurous about the music, those who want both conditions to be fulfilled and those who are fans and passionate fans of the band and only need the name of the band to be attracted.

Overcoming barriers

It also appears that fans are willing to make more sacrifices than the two other visitor types in terms of price, but mostly planning in advance and attending the event alone if they don't find somebody to come along. On the contrary, adventurous visitors tend to attend the event rather "if they have the time to distract themselves" i.e. they don't seem to be willing to plan in advance or change their schedules in order to attend it. They also seem more reluctant than other categories to travel further, especially if they are not accompanied, whereas the fans admittedly *prefer* to be accompanied, but pointed would mostly attend on their own as well.

Test with the poster-application

The application - which aimed at testing different communication alternatives regarding as to the content - revealed that the experiential aspects of the festival experience should be communicated, additionally to the tangible attributes. This was emphasized by visitors either preferring it for themselves or putting themselves in the shoes of those who might not know the musical content of the event.

3.2 Findings from the analysis of available quantitative data

First findings are to be found within the sampling method used and the questionnaires administered to festival visitors. A significant difference was found between the size of the experience-motivated visitors when considering paying and non-paying visitors. From this we can conclude that the barrier of having to pay for an event makes it less likely for visitors who don't know the content of the festival to attend it. But more important than the respective percentages of visitors which emerged is the fact that the category of experience-curious visitors exists, even though the little emphasis is put on the experience design by the festival promoter.

This indicates that content-motivated visitors are product-centered and for them, as soon as the band is booked for the event, their decision is made as to whether or not they want to attend it and they plan to. On the other hand, the decision to attend seems to be more spontaneous for attendees belonging to the experience-motivated category.

Conclusion

Relevance of the typology

As a conclusion, we can state that these different categories relating to the motivations exist within a same audience. Some visitors came because they wanted to experience a new festival concept, some attended because a particular band or artist was performing even though the experience design represented an added value and some visitors were interested both by the experience design and the music genre and would not have come without the combination of those two factors. The difficulty of the analysis lies within the fact that the differences between the visitor types are to be found in nuances. We can assume that visitors are to a certain extent always sensitive to both factors: experience design and musical content. The proportion to which these factors are important in the purchase decision and attendance process varies. For instance a fan of a particular band's primary motivation will be to experience this band live but the novelty of the experience design adds value to the concert. On the other hand, the adventurer will mostly be interested by the concept of the festival and the resulting experience more than by the music itself. However, his/her musical taste is not totally irrelevant, since he/she would not attend an event where he/she does not like the music *at all*.

There are clues indicating that a correlation between the willingness to overcome barriers and these categories exist. Indeed, as the comparison between the time of the ticket purchase with visitor categories suggests, experience-motivated visitors tend to be more spontaneous and don't plan in advance like fans do, buying their tickets earlier. Moreover, the analysis of the in depth interviews shows that one visitor won't always be part of a specific visitor category, he rather switches according to the program of the event. As fans focus on the content, they seem ready to make "sacrifices", which adventurers would not e.g. travelling further, arranging their schedule according to the event or going on their own.

The characteristics of these different visitor groups can be summed up in a graph, as follows:
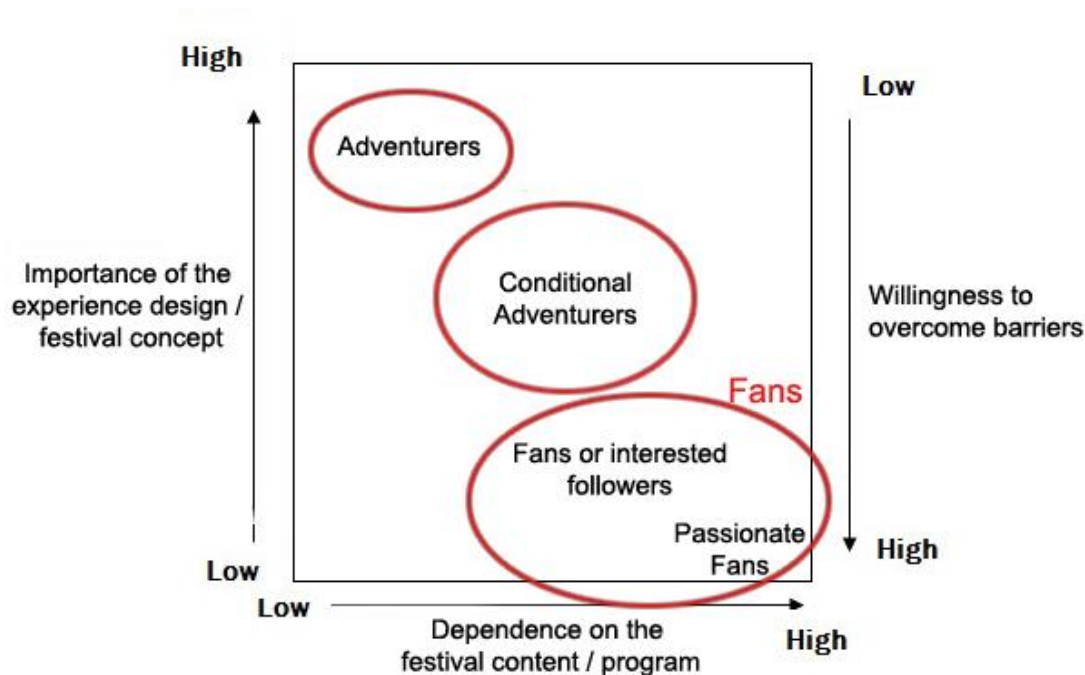
Fig. 14: Visitor categories by importance of experience design, festival content and resulting willingness to overcome barriers to attend

Implications for festivals

For new and innovative festivals, this means that the more the experience design is attractive and creative and on condition that it is communicated, the more it *somewhat* liberates the promoters from the musical content. Given that new festivals have often limited financial resources, this typology of festival visitors opens up new possibilities for success. Meanwhile, this typology is relevant for already established festivals as well; optimizing the festival experience will help broaden the potential targets and thus maximize visitor diversity and numbers. For festivals which are experiencing a decline in visitor figures, it can also be a mean to boost or revive their event.

Recommendations

Petkus (2004) noted that "simply having an experiential offering is different from actively and deliberately marketing that offering in an experiential way." There are many examples of researchers who states that businesses can be naïve because of their product-centricity while they are actually trying to sell an experience and they ignore the experience factor in the positioning of their corporate or brand image (Shaw, 2005; Schmitt, 2003; Getz 2008). For festivals, this translates into making the content, the program itself the main promotional argument, while research on motivation to attend festivals points out that "in some cases, motivations to attend have little to do with the actual festival program or content" (Lyon, 1998).

Acknowledging the experiential nature of festivals

The nature of services marketing suggests that image and positioning are essential for companies selling experiences. King (2002) already made the subtle distinction between promoting a tangible aspect of an experience and promoting the experience itself. The first recommendation which can be made is to implement a more experience-based positioning, all the more since – as the research has shown - a purely experience-motivated segment of visitors exists and adds up to the existing segments. This broadens the number of possible attendees, increasing the chances of success for innovative festivals, regarding visitor figures. The results of the empirical part also suggest that visitors react positively to a mixture in the promotion between experiential aspects and musical content (posters). Another possible implementation of experience promotion can be achieved with a video representing the festival experience, directly built into the website (for a good example, see the website of the Open Source festival, Düsseldorf, Germany).[15]

Optimizing and extending the customer experience

Since festivals are *all about experience*, it seems logical not only to promote, but also to optimize this experience in order to gain a competitive advantage. Therefore, an application and combination of CEM tools and frameworks appear to be relevant to music festivals. Moreover, experiences are holistic by nature and the process happens over time. Several simple and cost effective measures can be put in place in order to extend the festival experience to before and after

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[15] See appendix no. 10, website address : http://www.open-source-festival.de/en/

the actual consumption of the event: *upstream* and *downstream*. First of all, the relationship between customers and event promoter has to be extended to a wider period than a few weeks before and after the festivals. By extending and maintaining this relationship, it makes them more likely to promote the experience via WOM over the whole year instead of immediately before the event. Furthermore, the experience can be extended for instance by uploading *goodies* (e.g. wallpapers and screensavers) on the festival website in order to create the anticipation effect, setting up a competition for the best photo of the festival after the event and providing memorabilia (i.e. festival merchandise) for the customers.

Another part of the customer experience is the actual purchase of the ticket, which is critical, especially considering adventurers. These adventurers could read an article about the festival on a website or in the press and spontaneously decide to buy one ticket. But if this ticket service does not work or if it is not easy to buy this ticket, the adventurer might turn away and not go after all, the buying process being too "annoying".

Diversifying the communication (geographically, over time and its content)

As adventurers appear to be rather spontaneous visitors and fans plan more in advance, the communication efforts can be adapted to these different types. Music event promoters should take this into account and promote the event in regions further away from the festival location earlier than locally. The content of the communication can also be diversified, which was tested with the three possible alternatives of promotional posters in the empirical research. Instead of developing a campaign with only one poster, two posters could be designed; one promoting the Line Up, the other one emphasizing the festival experience. This can also be applied to other communication types.

Pulling down the barriers

As the study suggests, adventurous visitors, seeking new experiences, are more likely to attend events when the barriers are low. To attract this segment, festival promoters can analyze which factors represent barriers to attend their festival and pull them down in order to make it more accessible. This can be achieved by offering packages allowing visitors with more substantial travel distances to buy a trip-hotel-festival package. Locally, promoters could make a deal with public transport in order for the visitors to be able to take means of transport which are

paid for in the festival ticket. These are only two examples of ways to pull down barriers.

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Limitations and further research

Limitations

It is important to point out that the present research has limitations. First of all, the sampling method - which consisted in the festival visitors putting themselves in the 3 different categories during the survey administered during the festival – could be questioned because it was left to the participants to identify themselves as one particular type of attendee. This presupposes that they understand the differences between the categories. Moreover, the participants classified themselves in the respective categories according to the night on which they filled out the questionnaire, which did not reveal which type they corresponded to on other nights where they attended the event, possibly switching categories. The flexibility of the visitors according to the content made the analysis much more difficult and perhaps questionable.

Moreover, the issue of generalizability has to be emphasized. Indeed, this exploratory research design considers only a limited amount of participants (9) who participated in the qualitative research and therefore it represents only a very small sample of festival visitors. Additionally, the format of the NFF is more one of a concert series with people buying their tickets either for one night at a time or for 3 concerts, but the promoter did not offer one festival ticket for all the concerts which took place in the frame of the festival. Therefore it may be questionable whether the findings for this event format are generalizable to other event formats or not. Furthermore, the interviews conducted reveal that there are multiple factors involved in the decision process and not all of them are identifiable or generalizable; there are a lot of *what if's* involved. There appears to be a multiplicity of possible cases making the visitor _rather_ adventurous or _rather_ content-motivated, with a lot of possible *in-betweens*.

Concerning the concrete application with the three posters submitted to the participants of the study, it should be mentioned that they tended to judge the posters more by their design than by their content. Therefore, it was sometimes difficult to evaluate if a preference for one poster rather than another was due to its content (experience-led, mixed or only content-led) or its design.

As a general limitation, after the analysis of the qualitative data, it appears that the theoretical dichotomy between content-motivated and experience-motivated

visitors with the possible hybrid category was difficult to explore in a concrete application because of the numerous factors involved, and may be more suited for theoretical works than for empirical research on the subject.

Further research

The limitations showed that there is space for improvement and/or replenishment to the present research. A large scale analysis of quantitative nature could help determine the size of the experience-motivated segment. Nicholson & Pearce (2001) stated that the festival goers who were interested by what the festival has to offer represent the majority, but other than this statement, no empirical research has been carried out to prove this point. Therefore, it remains uncertain which concrete impact an experience-based positioning would have on attendance figures. Since it unfortunately proved to be rather difficult to clearly separate experiential aspects from content-related aspects - which could as well be just simply inseparable – a better framework for identifying the characteristics of these visitor categories could be developed.

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Appendices

Appendix 1 – Photograph and description of the Tonhalle in Düsseldorf, Germany

TONHALLE

Bei seiner Entstehung 1926 war der Rundbau am Rhein eines der ersten Planetarien der Welt. Er zählt zu den wesentlichen Bauten, die vom Architekt Wilhelm Kreis geschaffen wurden. Auch die heutigen Museen am Ehrenhof und die Rheinterrasse zählen dazu. Die Verwandlung in ein Konzerthaus vollzog sich erst vor einem Vierteljahrhundert, 1978 wurde das ehemalige Planetarium als Konzerthaus neu eröffnet. Die Tonhalle Düsseldorf genießt einen hervorragenden Ruf als klassisches Musikhaus und ist die Heimat der Düsseldorfer Symphoniker. Seine Akustik bietet kaum ein anderes Haus in Europa. Die Tonhalle verfügt über verschiedene Hallen.

(English)

On its completion in 1926, the round building now known as „Tonhalle" was one of the first planetaria in the world. It was part of a larger complex of buildings that comprised today's NRW-Forum, Museum Kunstpalast and Rheinterrasse. It was only in 1978 that the planetarium was converted into a concert hall. The Tonhalle retains an excellent reputation as a stage for classical music. It is also home to Düsseldorf's symphonic orchestra.

Source : Website of the New Fall Festival, http://www.new-fall-festival.de/orte/

Appendix 2 – Photograph and description of the Robert-Schumann-Saal in Düsseldorf, Germany

ROBERT-SCHUMANN-SAAL

Der in die Stiftung Museum Kunstpalast integrierte Konzertsaal wurde 2001 nach einer umfassenden Neugestaltung neu eröffnet und befindet sich in direkter Nachbarschaft der Tonhalle. Als multifunk-tionaler Saal mit Schwerpunkt Kammermusik bietet der Robert-Schumann-Saal ein attraktives Forum für kulturelle Veranstaltungen. Dessen Akustik ist kristallklar. Die knapp 800 Sitzplätze erlauben den Zuschauern eine gute Sicht auf die Bühne.

(English)

As a concert hall purpose-built for chamber music, Robert-Schumann-Saal is an integral part of Düsseldorfs Museum Kunstpalast. The venue is know for its elegant wood paneling and brilliant acoustics. It hosts a maximum audience of 800.

Source : Website of the New Fall Festival, http://www.new-fall-festival.de/orte/

NEW FALL FESTIVAL

Fragebogen

Die Umfrage wird für die SSC Group GmbH, Veranstalter des New Fall Festivals durchgeführt, um zu erfahren, wie das Festival von unseren Besuchern bewertet wird und welche Aspekte es zu verbessern gilt. Sie dauert zwischen 3 und 5 Minuten. Die gesammelten Daten werden anonym ausgewertet und vertraulich behandelt. Falls eine Email Adresse für die Masterarbeit unseres Praktikanten kommuniziert wird, wird diese auch unter keinen Umständen von der SSC Group genutzt, gespeichert oder weitergeleitet.

1. Welches Konzert wird gerade besucht?

_____ (Konzert und Ort)

2. Bitte wählen Sie Ihre Altersgruppe:

☐ Unter 18 Jahren   ☐ Zwischen 35 – 45 Jahren

☐ Zwischen 18 - 25 Jahren   ☐ Über 45 Jahre

☐ Zwischen 25 – 35 Jahren

3. Wo wohnen Sie derzeit?

☐ Düsseldorf / unmittelbare Umgebung (<   ☐ Ruhrgebiet
15 Km)
☐ Köln und Umgebung (> 15 Km)   ☐ Nordrhein-Westfalen
☐ Deutschland, Bundesland   ☐ Ausland, Land: ……………………………
....

4. Waren Sie im letzten Jahr ebenfalls beim New Fall Festival?

☐ Ja   ☐ Nein

5. <u>Wenn ja</u>, wie viele Konzerte haben Sie im letzten Jahr besucht?

_____ (Anzahl oder Tickettyp)

6. Inwiefern würden Sie sich als *Fan* des Künstlers des besuchten Konzertes betrachten? (das entsprechende Feld bitte ankreuzen)

Experimentierfreudig ("das Festivalkonzept war ausschlaggebend für meinen Besuch")	Interessiert ("die Musikrichtung entspricht meinem Stil und das Festivalkonzept hat mich angezogen")	Fan ("Ich betrachte mich als Fan oder interessiere mich besonders für die Band")	Großer Fan ("Ich würde ein Konzert dieser Band auf keinen Fall verpassen, wenn Datum, Zeit und Geld es mir erlauben")

7. Wie haben Sie vom New Fall Festival erfahren?

Presse
☐ Anzeige in einem Musik- / Szenemagazin
☐ Anzeige in einem regionalen / lokalen Magazin
☐ Artikel über das Festival
Weitere
☐ Empfehlung von Freund(en)/Familie
☐ Gewinnspiel / Verlosung
☐ Flyer / Plakat auf einer Veranstaltung

Online
☐ Banner auf einer Website
☐ Artikel auf einer Website / Blog

☐ Programmheft / Flyer in Bars o.ä.
☐ Plakate im öffentlichen Raum
☐ Andere: …………………………………………..

8. Wann haben Sie ihr Ticket gekauft?

☐ Abendkasse oder in der Woche vor dem Event
☐ 2 Monate vor dem Event
☐ > 3 Monate vor dem Event (Juni und davor)

☐ 1 Monat vor dem Event (September)
☐ 3 Monate vor dem Event (Juli)
☐ Nicht gekauft (Gewinner und Gäste)

9. Bei welchem Anbieter haben Sie ihr Ticket gekauft?

☐ CTS Eventim (Hardticket per Post)
☐ Vorverkaufsstelle
☐ Abendkasse

☐ Tickets.de (Online Ticket)
☐ Location (Tonhalle & R-S-S)
☐ Gewinn / Verlosung usw.

10. Bitte bewerten Sie folgende Aspekte des New Fall Festivals von sehr schlecht zu sehr gut:

Aspekte / Etappen	5 Sehr schlecht	4 Schlecht	3 Befriedigend	2 Gut	1 Sehr Gut	*Keine Angabe*
Ticketing und Orientierung						
Kauf des / der Tickets						
Preis-Leistungsverhältnis						

Wie bewerten Sie die Aktuelle Ticketingstruktur (Einzel- & Kombitickets)?							
Zugang zu den Locations / Orientierung							
Festival-Inhalt							
Bewertung des Veranstaltungsortes							
Bewertung des Festivalprogramms im Allgemeinen							
Wartezeiten und Pausen							
Länge des Zeitraumes zwischen Einlass und Konzertbeginn							
Länge der Pause							
Unterhaltung / Bewirtung wärend der Wartezeiten							
Marketing und Kommunikation							
Online-Auftritt und social Media							
Design der Flyer, Programmhefte und Poster							
Kommunikation über das Festivalkonzept							
Allgemeine Bewertung							
Allgemeine Bewertung des besuchten Konzertes							
Allgemeine Bewertung des Festivalkonzeptes							

11. Haben Sie Verbesserungvorschläge für das New Fall Festival 2013 oder weitere Kommentare?

_____
_____
_____

12. Würden Sie an einer wissenschaftlichen Befragung für die Masterarbeit unseres Praktikanten teilnehmen?

*Die **Emailadresse dient einzig und allein der Kontaktaufnahme und Terminvereinbarung**, um an einer qualitativen Studie teilzunehmen (In Form eines Teilstrukturierten Interviews oder einer Focus Group, dauert ca. 1 Std.) und wird keinesfalls an den Veranstalter - die SSC Group GmbH - weitergeleitet, gespeichert oder verwendet. Die Teilnehmer erhalten als Dank ein Ticket für das New Fall Festival 2013, sowie ein New Fall Festival T-shirt 2012. Zusätzlich werden die Teilnehmer über die Ergebnisse im Rahmen der Masterarbeit informiert.*

Name: _____ **Telefon Nr:**_____

Email: _____

Appendix 4 – Topic guideline of the in depth interviews

<u>Introduction:</u> Introduction of the interviewer and purpose of the study.

- **<u>Warm-up questions</u>**
    o **<u>Profile:</u>** Can you please introduce yourself, how old you are, what you do in life and especially how often you usually go to concerts and festivals and what role music plays in your life?

- **<u>First topic:</u> Motivation to attend**
    o **<u>Trigger:</u>** How did you learn about the New Fall Festival (NFF)? Is it the usual source of information you use to get information concerning music events?
    o **<u>Content:</u>**
        ▪ Did you know the bands which you saw performing at the NFF? What made you attend this particular concert(s)?
        ▪ In general, how important are the bands on the Line Up to you? Is it the first thing you notice or is there something else that triggered your attention?
- **<u>Second topic:</u> Festival experience components**
    o **<u>Experience design:</u>** How much attention do you give to the format of the festival and its philosophy? How important was the fact that the NFF Format, the concept is new (pop music in premium locations)?
    o **<u>Social togetherness:</u>** Did you come on your own to the festival? If no, would you have come alone? Why / Why not?
    o **<u>NFF Experience:</u>** How extraordinary was the NFF for you, to which extent does it stand out from other festival formats for you?
- **<u>Third topic:</u> Loyalty / intention to return / Trust**
    o Now that you have attended the NFF, would you return next year? Or is the experience-novelty effect gone? Why / Why not?
    o What does it change for you, now that have attended the festival? (for the editions to come) To which extent does it play a role, that the festival is established or not (i.e. has existed for sometime vs. a first edition.)
- **<u>Fourth topic:</u>**
    o **<u>Other variables:</u>**
        ▪ What do you think of the ticket price for the NFF? Is there a difference between before and after the concert? i.e. were your expectations met? In general, when you think about attending a music event, how do you evaluate if the price is too high or not?
        ▪ Did you travel far to come to the NFF? (if no) Would you have if you lived further away? What role does the distance to the festival location play for you, if you are attracted by the experience?
        ▪ Do you consider other factors, which we haven't discussed, in your decision to attend music events? In the case of the NFF?
- **<u>Poster exercise</u>:**
    o **<u>Show one poster after the other, starting from the experience-led one, until the product-led:</u>** At first sight, which poster attracted you most, triggered you attention? (Independently from the graphic design point of view).
    o **<u>Show the 3 posters side by side:</u>** Now that you have the three posters in front of you, which one fits the NFF the most? Why? Can you comment on the three posters? <u>Fazit</u>
- Summary of what has been said.
- Do you want to add anything? Did we forget an aspect?
- <u>Thank the participant and give him the promised T-shirt of the NFF 2012, as well as the Festivalticket 2013.</u>

Product- or content-led poster
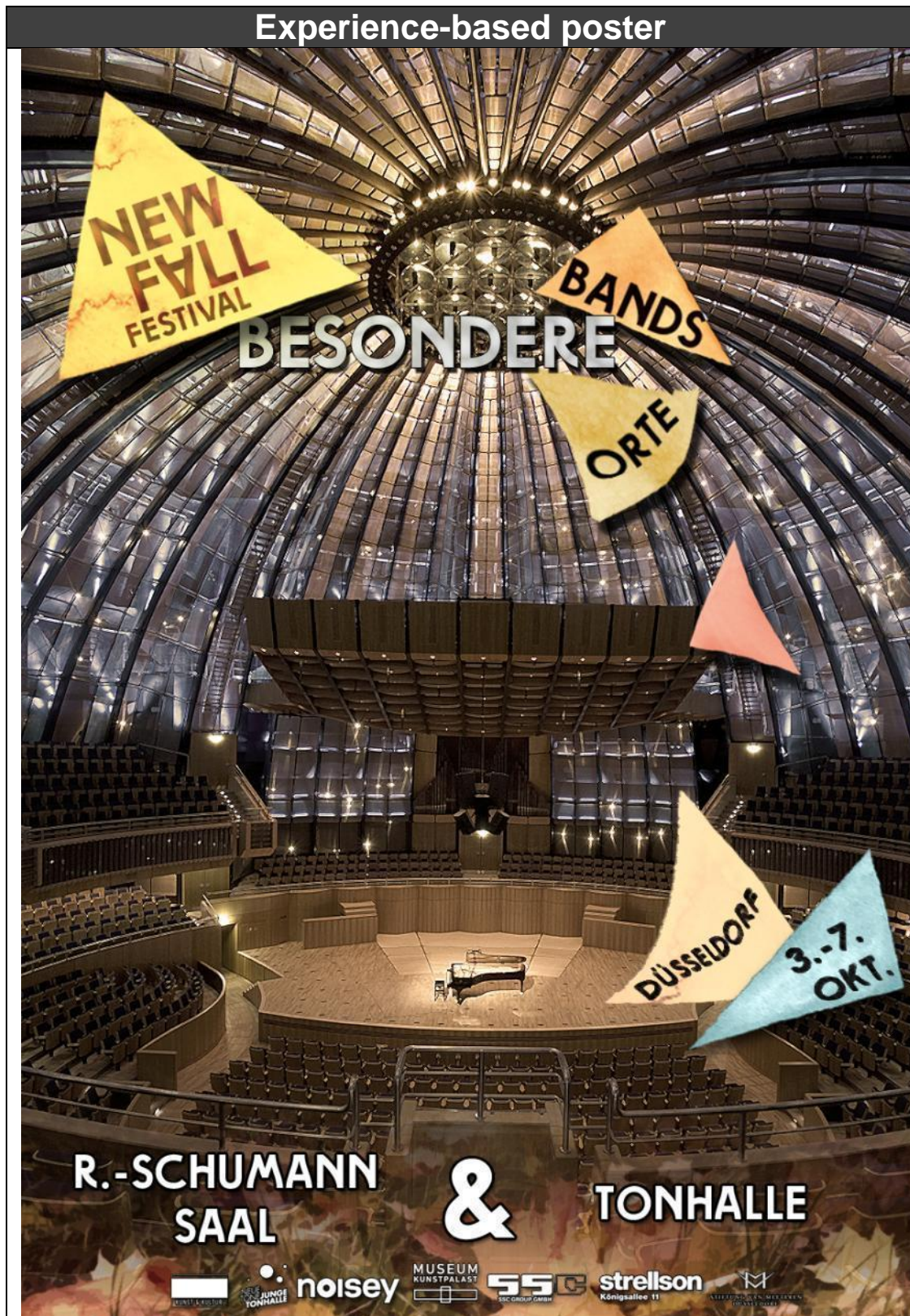
Mixed poster (experiential aspects and content)

Experience-based poster

Appendix 8 – [Excerpt] Findings from the quantitative analysis of questionnaires for the SSC Group GmbH, promoter of the New Fall Festival

CONFIDENTIAL

Interview 1 : conducted on Oct 17th 2012, duration 50 minutes

Profile	
Visitor category (self-estimation)	Mixed category (not a particular fan of the artist but "his/her genre" and attracted by the experience design)
Age	26 years old
Activity	Student
Festival and music event activity	Heavy concert (25-30 times / year) and festival-goer (3, 4 times / year)
Place of residence	Cologne, 30 kms from festival location
Sources of Information	Recommendations, web
Concerts attended at the NFF	3 (Kombiticket) – Notwist, tindersticks & Get Well Soon

First topic: motivation to attend / interest trigger

NFF was a recommendation from family members of his who went last year (2011) and he read positive reviews on blogs and in the Press. Moreover, he knows The Notwist and likes the band without really considering himself a fan, and they have quite a reputation in Germany. He had heard of tindersticks because they are well known and wanted to try it out, as well as Get Well Soon.

He describes the concept of the NFF, the experience novelty as an important factor. „It is a mix really of the bands which perform which I find interesting and the setting of the concerts (locations)." He was not sure about whether he would have gone if it had been in a regular venue.

Second topic: New Fall Festival Experience

He went with family who had been last year, social togetherness is a very important aspect, as well as discovering new bands. He knew Notwist well and 2 other bands of concerts he attended not so much but profited from the Kombiticket advantage to discover new bands. He would also have gone alone to the NFF, while he wouldn't have in a regular setting.

„It depends on the bands performing. I don't have to be a groupie of the band, but I have to like it. I don't think you become tired of the concept when you have been several times, because when you attend a lot of concerts in regular settings, having the NFF once a year will be a different experience all over again".

Third topic: intention to return / trust

Would return depending on the bands performing, but it is easier to attend as open air because requires less planning and „Arbeitsfreundlicher", it does not require a whole lot of planning in advance for him. Also, the participant said that if he had seen a Band 6 months before for example, and they were playing at the NFF, he would see them again at the NFF because th experience is so different.

Other variables:

He does not find the price too high, because he is very much aware of the fact, that the locations and experience (premium venues with other rules than regular formats) are worth paying more. Other factors: dates and friends or family. For a unique festival, he would travel far, but not alone, whereas if it is not far away, he would also go alone (not in a regular setting)

Poster exercise:

Product-led poster attracted him the most, but he knew the concept of the festival, he knew when seeing the name NFF. So once he knows the concept the Event, the content is what attracts him most, in ordert o find out if the music genre is something for him. If yes, he gets further information himself on the web. NB: Association with classical music when seeing Tonhalle picture alone without bands (image of the venue).

Interview 2 : conducted on Oct 22nd 2012, duration 40 minutes

Profile	
Visitor category (self-estimation)	Fan
Age	28 years old
Activity	Employed (nurse)
Festival and music event activity	Heavy concert attender (30-40 / year), light festival goer (1 / year)
Place of residence	Cologne (30 kms from festival) but works in the same city than festival location
Sources of Information	Specialized press & blogs (web in general)
Concerts attended at the NFF	3 (Kombiticket) - Get Well Soon, Ewert and the Two Dragons & tindersticks

First topic: motivation to attend / interest trigger

Saw the poster of the NFF at the Open Source festival. In general Open Air formats don't bother her if she knows the bands and absolutely wants to see them. However, for discovering new bands, she prefers the experience / concept to be new. At the NFF her attention was triggered by the names of the bands she is a fan (or interested follower) of (Get Well Soon and Ewert and the Two Dragons). These names on the posters were enough to attract her attention.

"I went to the concert alone because I could not find anyone to come with me, which was a shame but not a reason not to go"

Second topic: New Fall Festival Experience

She was a fan of Get Well Soon and knew Ewert & the two Dragons, would have gone anywhere if it was nearby, also in a regular venue. But this concert encouraged her to discover other bands which she didn't know (discovery factor). If the experience design had been different, she probably wouldn't have gone to tindersticks concert, a band she did not really know.

Third topic: intention to return / trust

She would come back NFF on condition of knowing names in the Line Up. If she knows the bands, she is sure she would come back, if she doesn't know any band / artist, undecided.

Other variables:

Decided to go for the kombitcket because she was interested in two nights already and it doesn't cost much more to buy the Kombiticket for three concerts instead of paying full price for 2, so she became adventurous for the third concert. For her, the price of the festival is no problem because "if I absolutely want to see a band play, I can pay a little more!" Additionally, if the experience is a new one on top, the price is justified because she gets to

see the band she wanted to see live play in a new setting, new experience design (added value).

In general she sticks with local concerts excepted if she is a huge fan of a band. Local is better because the barriers are lower: less traveling time, expenses, planning involved. If it is local, she says she would be more likely to go to a concert of a band she knows less but if she is a fan of a band, she often plans in advance in order to go to the concert.

Other important factor: she could pay only by credit card for the kombiticket and it didn't work with her bank. If a friend hadn't helped her out, she would probably just have bought the ticket for Ewert and Get Well Soon (VVKstelle), not the discovery for tindersticks.

Poster exercise:

Experience-based poster not attractive, she wouldn't notice it, probably because there is no name of a band which appeals to her. Poster number 2 (mixed) is better she says but she only notices the band and therefore the product-led poster appeals most to her because the emphasis is on the content and she knows a lot of the bands in the Line Up. She would then get information on the web to learn more about the festival.

Interview 3 : conducted on Oct 22nd 2012, duration 40 minutes

Profile	
Visitor category (self-estimation)	Experience-motivated
Age	47 years old
Activity	Employed
Festival and music event activity	Light concert goer (5-6 / year) and extremely rarely attends festivals ("maybe one every 4, 5 years")
Place of residence	Same city than festival location
Sources of Information	Posters in public space
Concerts attended at the NFF	2 – Get Well Soon & Caligola

First topic: motivation to attend / interest trigger

Knew Get Well Soon and bought a ticket for it but got adventurous so bought a ticket for Caligola. She saw the posters of the event and got attracted because of GWS. For her it is important to know at least one band in the Line Up, only then you get attracted to discover the rest of the bands.

Second topic: New Fall Festival Experience

Concept was the most important element for her to buy the ticket, she would not have attended in a classical concert format, in another location. In general, she finds formats very important, always get information about it before deciding to attend or not. She went to the NFF with her friend, which she considered to be a condition to go. The aesthetics of the locations is attractive, but also the service which is different to other venues „Man wird nicht wie ein Verbrecher behandelt".

Third topic: intention to return / trust

In general she likes to try out new things, it doesn't make a difference if the festival is established or not, she is more interested by the concept. For a very attractive one, she would travel far (planned a trip to Norway just to discover one festival) but then again not on her own because it would be boring. The experience sought can be more compared to

tourism because she is interested in seeing other countries, cultures etc. in the context of the festival which she would have travelled to. A lot of people she knows don't want to go if they never heard of the festival (not her case but it bothers her).

"I am not as price-focused as students might be"

Other variables:

Ticket for the Tonhalle was more expensive than the ones on the regular tour oft he band band she was willing to pay a little more for a better experience. However, young people who have less money might see it otherwise.

NB: If I lived further away from Ddorf and the band played in my hometown in a regular format, I would not have gone at my home town but come to Ddorf to attend the special event format of this band.

Poster exercise:

Experience based poster attracts her curiosity more because of the location and she would get further information on the internet by seeing it. If she had seen product based poster without knowing the bands, it wouldn't have attracted her at all, which "would have been a shame since the concept is excellent but the poster which was used this year doesn't communicate the concept at all, only people knowing the locations can interpret it that way"

Interview 4 : conducted on Oct 24th 2012, duration 45 minutes

Profile	
Visitor category (self-estimation)	Mixed category (not a particular fan of the artist but "his/her genre" and attracted by the experience design)
Age	30 years old
Activity	Employed in a marketing agency
Festival and music event activity	Heavy concert goer (30 concerts / year), less festivals (1 or 2 / year)
Place of residence	Same city than festival location
Sources of information	Music genre specific magazines, blogs, recommendations
Concerts attended at the NFF	2 - Get Well Soon (Fan) & tindersticks (adventurous)

First topic: motivation to attend / interest trigger

The concept of the NFF was very important to this person, it represents the identity of the festival, it makes it quite unique. She would not have attended the concert of Get Well Soon if it would have been in a regular multi-purpose hall, Get Well Soon was a perfect fit for the festival concept. She attended the event last year and knew about it because of it. Back then she learned about it via a recommendation and the posters in the street. She probably would have attended alone as well but not sure, going to the event with friends is very important to her (she always finds someone to come along).

"I am very selective in the type of events I go to, the concept plays a primordial role" – "For me the music product fades and got replaced by the experience"

Second topic: New Fall Festival Experience

What makes the NFF special is the sound quality in the locations and the unusual concept. Aesthetically, the locations are different from usual locations and how you get treated by the personnel (who usually welcome audiences for classical concerts) has a certain *charme* to

it, which makes it distinctive. Being seated is unusual for the audience but it is the concept of the festival so one has to cope with it. Moreover, at the NFF the bands make arrangements to their setlists, their songs, because the location is different, which makes it out of the ordinary.

"One has to get used to seats in this music scene, but it is nice to be able to listen to the music another way: relaxed and not exhausted from a whole festival day"

Third topic: intention to return / trust

After having attended the two previous editions, she has come to a point where generally speaking she trusts the booking of the festival. The programs have not been perfect (some inconsistencies e.g. Caligola) but it is not really a big deal, since one can choose which concerts to attend with the Kombiticket for 3 concerts. However, she prefers to wait before buying the tickets for next year, since it is probably not going to be sold out anyway or not that early.

Other variables:

She finds the ticket prices quite expensive but it is worth paying for because of the festival's uniqueness. The prices are not excessively high, just higher than usual for some bands which play there. The Kombiticket is quite a good deal as well, because it makes it more likely to go see bands, which she doesn't know because the relative price is lower than if one would buy three tickets for concerts separately.

"Generally speaking, I am ready to travel further for music events, but only if I am a fan of the band I am going to see or at least several when going to a festival. Moreover it depends on the date – if I work or not. Sometimes I make sacrifices to attend concerts but I really have to be a fan, otherwise it's more if I got some free leisure time."

"The Kombiticket makes it easier to be curious" – "I went to a concert where I did not know the band because a friend wanted to go, but I would definitely not have gone alone and I would not have been able to pay this price for a band I don't know"

Poster exercise:

She would choose the content-led poster because the content is what will tell her if she wants to get further information. If it is the case, she will get additional information on the internet, talk to friends about it and see if there are some articles on websites. She remembered that it happened like this in 2011 and she was hesitating whether to go or not to go and decided to go because the concept was different. The two elements came together: content and festival concept. But the first thing that triggers her attention is the content itself, also because she knows the locations and sees its names on the content-led poster and knows what these locations are like.

Interview 5 : conducted on Oct 29th 2012, duration 30 minutes

Profile	
Visitor category (self-estimation)	Experience-motivated
Age	24 years old
Activity	Student
Festival and music event activity	Recently increased under the influence of her boyfriend (before never, now: 1, 2 festivals / year & around 10 concerts / year)
Place of residence	Freiburg (450 kms from festival location)
Sources of Information	Recommendations

Concerts attended at the NFF	3 (Kombiticket) – Notwist, tindersticks & Get Well Soon

First topic: motivation to attend / interest trigger

NFF was a recommendation since her boyfriend was there 2011 and were enthusiastic about it. She has never been used to going to concerts and festivals so she doesn't seek information in general concerning these events.

"Music was never really a big deal for me, if it wasn't for my boyfriend, it still would not really trigger my interest today I guess"

Second topic: New Fall Festival Experience

Found the concept interesting, seated and perfect for the time of the year (fall). Experience design was more comfortable, the locations were a major attraction factor (esthetic factor) but the most important one is the influence of her boyfriend who wanted to attend the event. She would not have gone on her own, concerts in General only with friends and/or family, otherwise she is not interested (even for a band she likes a lot).

Third topic: intention to return / trust

She would come back next year, but doesn't really know if she should wait for bandst o be announced or not, in case there is nothing interesting to her… Locations still attract her even after having experienced them once, because the event is only once / year and it remains different than all the other concerts in regular halls. It's the only kind of format which makes bigger crowds comfortable for her, she wouldn't enjoy open airs with the same crowd than at the NFF for example.

Other variables:

Since she is a student, the price of the ticket is an investment, quite expensive but in the scope of her incomes, not compared to other concerts. She finds it a little more expensive than other concerts, but ready to pay for it since the experience design is better.

She would also go further away on festivals in general, the experience design plays an important part, the concept of the festival and if someone comes along or not (decisive factor). But if the music genre is not hers, even if the festival is next door and free, she wouldn't go, so the music genre is a condition to her presence.

The size of the festivals plays an important role, the price, socialization (friends coming or not) and dates. If she has other things planned, she prefers to do the other things (like going to a football match) instead of going to a concert.

Poster exercise:

Chose Poster nr. 2 (mixed). The product based poster doesn't put the special thing about the festival forward. However, the Tonhalle makes most people think of classical music, which is not the genre of the festival. On the experience based poster, if it was on ist own, one could not get orientation on the musical genre (even without knowing the bands) and might walk by it, excepted if the name NFF rings a bell.

Interview 6 : conducted on Oct 29th 2012, duration 30 minutes

Profile	
Visitor category (self-estimation)	Mixed category (not a particular fan of the artist but "his/her genre" and attracted by the experience design)

Age	28 years old
Activity	Employed
Festival and music event activity	Heavy concert goer (over 40 / year), more selective with festivals (1, 2 / year)
Place of residence	Same city than festival location
Sources of Infirmation	Specialized press and internet (websites of magazines, event lists and blogs)
Concerts attended at the NFF	3 (Kombiticket) – Notwist (interested), tindersticks (adv) & Get Well Soon (Fan)

First topic: motivation to attend / interest trigger

Learned about the NFF in Intro, there was an article in it, showing the content (bands) but also putting the concept, the experience design forward. But what attracts him first are the bands performing and the real added value comes with the value NFF concept because he values sound quality and new event concepts. In general he likes to try out new things but only on recommendation, advertising doesn't really affect his choice, word-of-mouth is very important (friends and family). Before attending an event of a band he doesn't know, he listens to their music first. The Kombiticket principle made him experience oriented for one concert (tindersticks).

Second topic: New Fall Festival Experience

It is very important to him, that the size of the festival is not too much. Rather „Quality than quantity", also in the content (pre-selection of bands, issue of trust towards programming comes into play). He would not have attended Get Well Soon concert (fan of band) in a regular big concert hall. Attended the festival with friends and family. When he is on his own, is becomes very product oriented, only the band is of relevance then.

Very enthusiastic about the locations, one can't see these bands in these locations ever, except with the New Fall Festival.

Third topic: intention to return / trust

One has to see the musical year as a whole, the NFF will remain different from all the other formats and the experience will always be a special one because it is so different from all the other formats. However, musical discovery or always seeing new bands is very important, he wouldn't go again if there was no big rotation in the Line Up.

Other variables:

Price for Kombiticket is ok, 75€ is not a lot, considering one would pay 30€ for a Notwist concert alone usually. Locations make it worth paying a little more according to him, however, not a lot more, prices still have tob e more or less aligned with other concerts.

He would also travel further for events which attract him especially, but in this case the decisive factor is the Line Up. If the „knaller Line Up" is on a festival, he would definitely make „sacrifices" to attend, if friends come with him. If a lot of friends travel far for a festival which he is interested in (but not especially drawn to) he would also attend (tob e with friends and experience it as a discovery). Money, time and travel distance play a role and interact. Relies on what friends tell him about the event and generally looks for what people say about it on the internet.

Poster exercise:

Experience based poster is attractive but there are no bands. But since he knows the festical, the poster would attract him because he knows the music genre of the festival. The

second on eis visually not attractive at all (design) but it comes closest to what the NFF stands for (with the locations and the slogan). He thinks for people who don't know the event, mixed poster would be best but he only needs product based poster now since he knows the festival concept.

Interview 7 : conducted on Nov 1st 2012, duration 30 minutes

Profile	
Visitor category (self-estimation)	Fan
Age	38 years old
Activity	Employed (teacher)
Festival and music event activity	Heavy concert goer (about 40 / year) but no festivals
Place of residence	Cologne (30 kms from festival location)
Sources of Information	Posters in public spaces, concert promoters and websites of the bands he is interested in
Concerts attended at the NFF	1 – The Notwist

First topic: motivation to attend / interest trigger

His attention gets triggered by a name he knows when seeing it e.g. on a poster in public spaces or on the radio during a concert announcement. "Normally it is dependent on the content and less spontaneous, the Band has to fit my taste. Sometimes it is the location as well but I can't really think of an example now"

Second topic: New Fall Festival Experience

He would not have gone to see another band in an experience design where it would have been organized in a usual concert location (multi-purpose hall) and in that case he would have been even less likely to drive 30 kms from his home. Moreover, if he has to work the day after, he doesn't want to travel too far or come back home too late. In that sense, many factors are important to him when considering a music event.

Was there with friends and would have attended alone as well. The locations were very important in his purchase decision because he had never been to the location but had seen photographs and found it esthetically appealing. He did not know the other bands performing and was not willing to travel the distance again for a band he doesn't know.

Third topic: intention to return / trust

Dependent on the content, the bands playing have to be attractive to him because of the distance to travel. However, the concept of the festival would encourage him to go the distance because, if an interesting band played in Düsseldorf in a multi-purpose hall, he would not go.

"The fact that I have been there this year makes me want to see other bands play in these locations and under these conditions"

Other variables:

The price was good, some (e.g. students who have less money) may consider it a little high but the price for the concert he went to is aligned to the one he would have paid in a less attractive experience design, he evaluates. The NFF-festival concept is an important added

value and "I am willing to make this financial investment for this new experience." And the distance to travel between Cologne and Düsseldorf is not that big, it stays rather local.

Poster exercise:

He preferred poster no. 2 because the location seems attractive to him and serves as a further argument for the festival. One can see the name of a band which attracts him but could decide not to go because he had seen the band not long before but the novelty of the experience is a factor which encourages to attend, it is a real added value, so it should be in the promotion, like in poster no. 2. But the poster without the bands does not seem attractive to him because one doesn't know at all what type of music it is and which bands are playing, it is a necessary condition to attend!

Interview 8 : conducted on Nov 2nd 2012, duration 45 minutes

Profile	
Visitor category (self-estimation)	Fan
Age	20 years old
Activity	Student
Festival and music event activity	Medium concert attendee (about 2 times / month) and festivals (1 or 2 / year)
Place of residence	Same city than festival location
Sources of Information	Specialized press, social media of the band and their website, blogs and forums
Concerts attended at the NFF	1 – Why? (name of the band)

First topic: motivation to attend / interest trigger

The most important factor she takes into account ist he fact if she likes the band or not, she doesn't really explore other festivals where she doesn't know the bands except if one band at least which she knows plays there, then exploration of other bands is possible (for the same price i.e. one festivalticket). If she doesn't know any bands, she wouldn't go. NFF concept is important to her because it is a real added value.

Second topic: New Fall Festival Experience

For why? She would also have gone to a concert in Ddorf at the same time and date in a regular concert format „auf jeden Fall". She would have gone alone as well, but it's always nicer when friends come with you. She was at the NFF with 2 friends. The concert itself was not that good because there were not enough people to get the „euhporical crowd" she likes.

She did not really pay much attention to the location before, she was only interested in seeing the band live, but once there, she was (positively) surprised by the location. However, she was disappointed by the event because there were not many visitors, the room was "almost empty" and it affected the atmosphere, as well as the band as far as she could tell.

Third topic: intention to return / trust

Whether she would come back the year after depends on whether she knows the bands, she at least to have heard of them or their music, she doesn't have to be an absolute fan. However, she describes herself as experience-interested „if the content is right". I fit is her

musical style, it is good, but it's even better if she is a fan of the band, then she would not miss the concert.

Other variables:

She was willing to pay the higher price for the band, she absolutely wanted to see them play. After the concert she was disappointed because the overall experience was not that good; the hall was empty and it killed the atmosphere. She would also travel further to see the band play. For the particular concert she did travel 450 kms in order to see the band play, because at the time she lived in another city. The date is also important, even if she would be willing to "make some sacrifices" in order to see the band for example arrange her schedule.

Poster exercise:

To her, the content-led poster was the best, the slogan on the two other posters is not necessary; the Line Up implies the value proposition of the festival. However, the mixed poster is interesting as well, mostly for people who don't know the bands maybe, they get a reason to attend the event "even if they are not hardcore fans of the bands in the Line Up".

Interview 9 : conducted on Oct 3rd 2012, duration 35 minutes

Profile	
Visitor category (self-estimation)	Experience-motivated
Age	56
Activity	Self-employed (architect)
Festival and music event activity	Medium concert goer (5 concerts / year) and very light festival goer ("maybe 1 every two years if it's not far away")
Place of residence	Same city than festival location
Sources of Information	General mainstream press, radio and recommendations for new experiences
Concerts attended at the NFF	1 – A. Noto & Ryuichi Sakamoto

First topic: motivation to attend / interest trigger

He read about the festival in the regional press (Rheinische Post) and was curious because he usually attends classical concerts at the locations where the NFF was organized. The locations are not far away from his home, so it is "no big deal." He asked somebody who works for the location what the festival really was and decided to try it out. He had heard of Ryuichi Sakamoto before the event because he usually plays classical music but he did not know the project with Alva Noto.

Second topic: New Fall Festival Experience

The concept was the most important factor because he had been to classical concerts several times in that location and had wondered what it would be like with other musical genres. He went there with his wife and probably would not have gone alone because "if I want to discover something new, I want to share it with someone. Eventually, it was a good decision, even if it is not the kind of music I would listen to at home, it was something to see live, it was different!"

Third topic: intention to return / trust

He was not sure whether he would come back for another concert in 2013, maybe he would first see which bands / artists are performing and then decide whether he would come back

or not. However, "the experience was so pleasant that I don't necessarily have to know the band, if a friend of mine recommends an artist I would probably go because I really enjoyed the festival concept!"
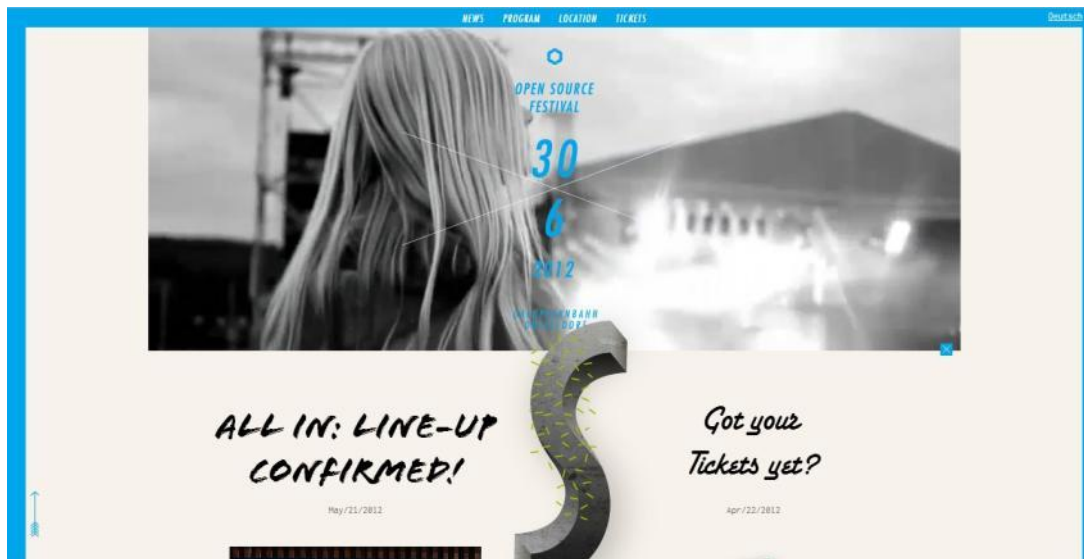
Other variables:

The price was not prohibitive at all, it was neither cheap nor very expensive. "I don't pay too much attention to price as long as it is not extraordinarily high". Because of his age and his (busy) activity, he is rather reluctant to travel far for events even if they seem interesting to him. Also, if he has somebody over, his children or family, or just something else on his schedule, he won't change plans in order to attend the event. It is rather a matter of spending free, leisure time, "doing something else than the usual stuff like watching TV or reading my books".

Poster exercise:

According to him the best poster is the mixed poster if he would have to choose between the three because the concept is included in it but also the bands which perform. He thinks the bands are still important on promotional material because one doesn't have to get information first from the website concerning which artists play and then have a closer look at the artists, it represents kind of a detour. But one alternative would be do promote the event with two of those posters, one where there is only the Line Up and another one similar to the experience-based poster; like an image-campaign.

Website: http://www.open-source-festival.de/en/