



The Routledge Handbook of Festivals

Edited by Judith Mair

THE ROUTLEDGE HANDBOOK OF FESTIVALS

In recent times, festivals around the world have grown in number due to the increased recognition of their importance for tourism, branding and economic development. Festivals hold multifaceted roles in society and can be staged to bring positive economic impact, for the competitive advantage they lend a destination or to address social objectives. Studies on festivals have appeared in a wide range of disciplines, and consequently, much of the research available is highly fragmented.

This handbook brings this knowledge together in one volume, offering a comprehensive evaluation of the most current research, debates and controversies surrounding festivals. It is divided into nine sections that cover a wide range of theories, concepts and contexts, such as sustainability, festival marketing and management, the strategic use of festivals and their future.

Featuring a variety of disciplinary, cultural and national perspectives from an international team of authors, this book will be an invaluable resource for students and researchers of event management and will be of interest to scholars in the fields of anthropology, sociology, geography, marketing, management, psychology and economics.

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Edited by Judith Mair

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PART I

Introduction



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INTRODUCTION

Judith Mair

Festivals represent a vital part of human society, and they have done so for millennia. The history of festivals is likely to go far back into the past, long before the written history of civilisations began. The desire to mark particular occasions, such as equinoxes, solstices and harvests, with communal expressions of feelings has been around since the Neolithic times (Biaett 2017) and continues to this day. Festivals traditionally allowed respite from hard work and mundane daily life, injecting a certain amount of socialising, relaxation and rejuvenation into what Hobbes argued might otherwise be the solitary, nasty, brutish and short existence of many peoples throughout history. In recent times, the importance and number of festivals has increased, primarily in tandem with the increasing importance placed on festivals (and other events) as opportunities for increased tourism, branding and economic development. Boorstin (1961) refers to these as pseudo-events, but regardless of where you stand on the authenticity and effectiveness of such economically and politically motivated festivals, it is fair to say that they are booming and as such are deserving of significant research attention.

As noted, festivals hold multifaceted roles in society, spanning economic development, tourism benefits, social outcomes and others. Although many festivals have been held for decades or more and celebrate important religious or historic traditions, there are significant economic advantages to be gained from either ‘re-imagining’ them or from generating new festivals. For example, festivals (along with other types of events) can be staged or supported by governments for instrumentalist purposes – to bring positive economic impact, secure jobs and growth, underpin regeneration and catalyse infrastructure development (Getz 2009). Festivals and events are often sought after as part of a destination’s tourism product offering, for the competitive advantage that they lend a destination and for the marketing and branding benefits they offer (Jago & Dwyer 2006). Festivals are also often created by governments to address a range of social objectives, such as generating social capital, enhancing community cohesion, strengthening community resilience and encouraging tolerance of diversity (Duffy & Mair 2017). Finally, festivals have other roles, which are often underplayed in comparison to the neo-liberal economic development agenda. These include the opportunity for activism and protest, counterculture and catharsis.

Festivals have been the subject of considerable research, but much of this is highly fragmented, with studies on festivals appearing in a wide range of disciplines, including anthropology, sociology, human and cultural geography, marketing, management, psychology and

economics, and the broad field of tourism and hospitality. There have been attempts to bring this disparate knowledge together in review studies, with perhaps the best known being that of Getz (2010). Getz identified three major discourses from his review – a classical discourse, concerning the roles, meanings and impacts of festivals in society and culture; an instrumentalist discourse, where festivals are viewed as tools to be used in economic development, particularly in relation to tourism and place marketing; and an event management discourse, which focussed on the production and marketing of festivals and the management of festival organisations (Getz 2010). Other reviews have taken a discipline-specific approach (see, for example, Cudny 2014 on festivals and geography, Frost 2015 on festivals and anthropology and Dowson in this volume on religious and spiritual festivals). However, the subject is so vast it is difficult to get a sense of the full breadth of knowledge that lies at the heart of festival studies.

The Routledge Handbook of Festivals aims to bring this knowledge together in one volume, presenting an array of chapters that focus on a variety of topics, contexts and methods, thus contributing to our knowledge of festivals around the world.

Definitions and roles of festivals

Festivals are events which are designed for public participation; they may be either traditional or contemporary in form and celebrate a range of themes. In some senses, festivals appear to defy any neat definition – while Getz (1991) referred to them as public events that celebrate a specific theme, a cultural season or a time of year, he goes on in later work to consider them to be more of a spectrum of ideas (Getz 2010). There are several definitions that are used in order to create a basis for research, ranging from the very broad, ‘public themed celebrations that are held regularly’ (Wilson, Arshed, Shaw & Pret 2017, p. 196) or ‘social activities seen as an expression of social norms and the values of a society’ (Chacko & Schaffer 1993, p. 475), to the more specific ‘themed public occasions designed to occur for a limited duration that celebrate valued aspects of a community’s way of life’ (Douglas, Douglas & Derrett 2001, p. 358). It seems appropriate for me as editor of this handbook to examine how festivals can, or should, best be defined.

There are a range of characteristics that make it problematic to define festivals in one brief sentence. Thus, perhaps it is more appropriate to consider the full gamut of dimensions that have relevance to festivals in order to fully comprehend their scale and scope. The most important elements are highlighted. In relation to timing, festivals are almost always **short term** and are usually **recurring** (e.g. Saleh & Ryan 1993; Getz 2008). Another key dimension is that festivals are always open to the public – while there may or may not be an entrance fee or other charge, festivals are generally **publicly accessible** as opposed to closed meetings or events where an invitation is required (e.g. Kim, Uysal & Chen 2001; Wilson et al. 2017). In nature, festivals tend to be **celebratory**, although the specific theme of the celebration varies widely from religious and/or traditional to contemporary and arguably inauthentic (Green 1997; Douglas et al. 2001; Getz 2010; Jordan 2016). Nonetheless, the theme usually relates to an element of **culture**, be that traditional culture (religious or secular) (see, for example, Turner 1974 or Falassi 1987), high culture (such as opera, the arts or gourmet food, for example) or popular culture (such as folk or pop music) (inter alia Picard & Robinson 2006; Crespi-Vallbona & Richards 2007). Festivals are usually **place-based** and often celebrate the history, tradition or culture of a particular place (Hall 1989; Saleh & Ryan 1993; Derrett 2003; Getz 2010; Mair & Duffy 2015). Festivals are also social phenomena (Duffy & Mair 2017), and **communities** are at the centre of festivals, whether

that implies place-based notions of communities (which is often the case) or broader communities of interest (De Bres & Davis 2001; Arcodia & Whitford 2006; Moscardo 2007; Jepson & Clarke 2015; Black 2016). Festivals often, although not always, have a **performative** element, with music, songs, dancing, parades or other ways of showcasing a way of life. Finally, the behavioural and affective elements of festivals help to differentiate them. The behavioural dimension of festivals highlights that they are often used to provide **recreation and entertainment** involving interaction and socialising (Jago & Dwyer 2006; Lee, Arcodia & Lee 2012). In relation to the affective dimension, festivals are often considered to relate to **feelings of belonging and sharing**, connection and cohesion (Johnstone 2012; de Geus, Richards & Toepoel 2016; Duffy & Mair 2017).

Therefore, perhaps an appropriate, if lengthy, definition of festivals might be

short term, recurring, publicly accessible events that usually celebrate and / or perform particular elements of culture that are important to the place in which they are held or the communities which hold them; that provide opportunities for recreation and entertainment; and that give rise to feelings of belonging and sharing.

Outline of contributions

The handbook is divided into nine sections based on the broad underpinning theories, concepts, contexts and topics of the chapters contained in each section. These are the Introduction, Sustainability, Festival Management, Festival Marketing, the Strategic Use of Festivals, Festival Experiences, Types of Festivals, Cultural Perspectives and the Future of Festivals.

Introduction

This section sets the scene for the handbook. The current Introduction chapter offers some initial thoughts on the definitions and roles of festivals. Following from that, Gouthro and Fox systematically examine recent developments in research in the festival sector literature, providing a detailed investigation of the methods and paradigms that inform research in this field and demonstrating the predominance of quantitative methods (particularly surveys) while at the same time highlighting issues for future festival researchers in relation to big data and ethics. Getz, Andersson, Armbrecht and Lundberg address the conceptual and philosophical issues associated with placing a value on a festival. Their chapter provides a theoretical and practical framework within which value issues can be addressed, using the dimensions of people, the economy and the environment. Finally in this section, Zhang considers the meaning of festivals, proposing a new semiotic approach. Zhang notes that while much research has concentrated on *what* is a festival, a better approach may be to interrogate *how* is a festival [experienced, understood, presented].

Sustainability

This section naturally covers the key fundamental tenets of sustainability – the economic, social and environmental impacts of festivals. Initially, Dwyer and Jago examine the economic evaluation of festivals, highlighting the challenges associated with developing techniques which give accurate results while at the same time being practical for policymakers making decisions on the allocation of scarce resources. This is followed by an analysis of

the social sustainability of festivals by Quinn, who points to the ever-increasing importance being placed on the ability of festivals to achieve social goals. Quinn concludes that festival research should examine the processes underpinning social change, taking account of the growing influence of more social science concepts and theories, and utilising more critical enquiry. An additional chapter on social sustainability is provided by Wilmersdörffer and Schlicher, who use a case study of the Wacken Open Air festival to analyse the interdependencies of sociocultural impacts and create a tool to assist in the development of policy for the sociocultural sustainability of festivals. Finally, Jones presents a discussion on the environmental sustainability of festivals; identifies common festival environmental issues and impacts, and how to minimise or mitigate these; and explores opportunities for festivals to contribute positively to environmental sustainability through legacy and education initiatives.

Festival management

The festival management section consists of a mix of practical management information and advice, and more conceptual ideas about the ways in which festivals can view their management models. Holmes, Lockstone-Binney, Smith and Rixon-Booth examine the perennial issues of volunteer management, reporting on a new volunteer management model for recruiting and managing volunteer programmes across a range of festivals which has widely been recognised as an example of best practice in this space. Hutton examines another important contemporary issue for festival managers – alcohol and drug misuse at outdoor music festivals. Hutton demonstrates how harm minimisation and health promotion activities can reduce reliance on the healthcare system and thus reduce the burden on the wider community. Sigala considers how social media are transforming the way that festivals are planned, managed and executed. Sigala's chapter examines changes both in the place/space in which festivals occur and in the way in which a variety of actors now play a role in the initiation of festivals. In their chapter, which uses examples drawn from the Macau Arts Festival, Zhao and Lei investigate festival innovation. As they point out, while novelty is an often-cited festival attendance motivation, little is known about what constitutes novelty or how festivals can be innovative in their development of novel approaches. They conclude that further research is needed to understand innovation in the complex domain of festivals. Finally, Luonila examines networks of meanings in festival production. Luonila's chapter sets out to capture the dimensions of meanings related to the fundamental activities of festival management and to analyse how these dimensions of meanings are reflected in managerial practices and decision-making, and thus can serve as a basis for comprehending the role and the effectiveness of festival stakeholders in festival production.

Festival marketing

Festivals rely on a multitude of stakeholders, and the chapter by Aktas and Sel takes a strategic marketing approach to examine an important festival stakeholder – the sponsors – and highlight a lack of research into festival sponsorship as it relates to festival context, location, scope and participant types. Using a case study of two festivals in Izmir, Turkey, the chapter demonstrates that there are a range of elements that contribute to the success of festival sponsorship. Moving to other forms of marketing, festivals are increasingly being expected to play a role in destination branding by offering an activity to encourage tourist visitation. This is not necessarily the fundamental *raison d'être* of festivals, and so it is important to

examine how successful or otherwise such festival marketing can be. Ayazlar examines the role of festivals in destination branding by taking a case study of a Turkish strawman festival, demonstrating clearly that while the festival may not have been started for tourism purposes, it nonetheless offers a unique and distinctive addition to the destination's brand and product offering. However, Ayazlar draws attention to the risks associated with the use of the festival as a marketing tool, particularly those risks associated with loss of authenticity. Barrera-Fernández, Hernández-Escampa and Balbuena Vázquez take a different approach, examining the use of a cultural icon (in this case Cervantes) to promote a destination in Mexico with no apparent connection to Cervantes. In this case, there is no authentic link between the topic of the festival and the destination, yet the festival has led to the production of new tourist attractions and experiences, and to the branding of the destination as relating to Cervantes. Finally, Sigala examines social media and festivals, and adopts a co-creation approach for examining the use and impact of social media on two major festival stakeholders, namely festivalgoers and festival organisers. Sigala demonstrates that social media is having a transformational impact on the festival industry by changing the roles and the functions of these stakeholders to become more collaborative and social.

Strategic use of festivals

As has already been discussed in this chapter, festivals are increasingly being used as instrumental devices for a variety of policy aims relating to economic and social development. Devine, Quinn and Devine use a festival in Northern Ireland as an example of how festivals can be used to bridge divides, in this case a political, cultural and religious divide. Their chapter illustrates how the festival organisers were able to work through obstacles and encourage positive cross-community social interactions. In a similar vein, Wise, Armenski and Davidović use the example of the Exit Festival in Serbia, a highly successful festival that has grown out of protest and struggle, to document the relationship between festivals and the tourism they promote. However, this chapter offers a warning for destinations who fail to adequately work with festival organisers, leading to lost opportunities. Macau is the context for the chapter by Couto, which examines how the political and cultural situation in any given city or country can influence the success or otherwise of festivals. Couto problematises the idea of the eventful city, highlighting concerns over the instrumental use of festivals for boosterist purposes, to the potential detriment of the beneficial social outcomes of festivals. Mackley-Crump takes the example of the Pride Parade in Auckland, New Zealand, and discusses protests against a festival, providing a demonstration of what happens when the strategic use of festivals by municipalities comes into conflict with the communities the festivals are supposed to celebrate. The chapter identifies in particular the implicit tension between corporate and community stakeholders, and critiques of the homonormativity and commercialisation of Pride events. The chapter by Mackay, Fountain and Craddock-Henry focusses on the rural context and on the opportunities festivals create for enhancing social connectivity and resilience within communities. Taking two festivals in New Zealand as case studies, they emphasise the benefits of rural festivals as providing time and space for active citizenship, community collaboration and teamwork while at the same time offering essential economic advantages. Finally in this section, Best takes an autoethnographic approach and introduces the example of the Geelong Revival festival, which focusses on the heritage of Geelong (Australia) as a car-manufacturing city. Best argues that the festival encourages a tangible sense of Geelong's community well-being and social capital as well as its historically significant automotive heritage.

Festival experiences

This section delves into the various ways of investigating, understanding and documenting the experiences associated with festivals as they apply to different stakeholders, including attendees and local residents. Stadler and Jepson examine the impact of festival attendance on family quality of life, highlighting findings about the importance of understanding the family unit (particularly where there are young families) as a particular market segment with specific needs and wants. Significantly, barriers to festival attendance are identified as cost, the potential overstimulation of children and the lack of opportunities provided by festivals for family bonding. Biaett takes a novel approach, using a confessional tale to exemplify experiences of attending festivals in terms of bonding and bridging social capital. The chapter concludes that a combination of collaborative and creative activities, a stimulation of the senses and the arousal of emotions create an atmosphere that can give rise to increased bonding capital and feelings of well-being. In a chapter examining the current state and future implications of ICT integration into festival experiences, Van Winkle, Mackay and Halpenny focus on the use of the internet, mobile devices and social media, investigating the implications of these trends for the festival experience. They suggest that while the topic is receiving research attention, further inter- and transdisciplinary studies are required in order to understand the implications of this dynamic field. Moving away from the attendee to local residents, Brás, Mendes, Guerreiro and Sequeira investigate how local residents experience their own festivals. Using the example of an Islamic festival in a small village in Portugal, the chapter considers both the experiences of residents during the festival and the subsequent meanings that locals attach to the festival. Bras et al. identify three key stages of resident involvement – a sensory experience, a cultural experience and a practical interaction experience. Finally, Coyle and Platt look to feminist politics and experiences to document a critique of festivals in relation to intersectional feminism. Their chapter examines festivals as a space for women, festivals as platforms for feminist politics and feminist festivals as spaces of empowerment, and draws important conclusions about the festivalisation of feminism.

Types of festivals

As identified earlier in this chapter, there is a multitude of different types of festivals that can be studied, each offering its own individual characteristics and contexts. Each of the chapters in this section uses a different type of festival as a basis for discussing a range of issues and challenges. Laing, Frost and Kennedy examine rural food and wine festivals, identifying some of the challenges faced by rural festivals, including lack of resources and expertise to keep the festivals viable in the long-term and attracting tourists to places that are geographically isolated. They conclude that such festivals can indeed bring economic and social benefits, and can bring together diverse stakeholders to collaborate on local food and wine branding. Lema, Cassell and Agrusa take music, media and film festivals in Montserrat as their starting point and use these to discuss the challenges associated with branding and marketing an island destination. Their findings suggest that music, media and literary festivals can support a sense of place for Montserrat and help to communicate the unique cultural underpinnings of the culture. Music festivals are also the focus of the chapter by Duffy, who takes a different approach, examining the relationships between music, identity and experience as mediated by performance. Duffy proposes that music festivals offer important forms of participation that facilitate belonging and identification through representational and experiential processes, and stresses the need for further research in this area. Religious and spiritual events form a large proportion of traditional and historic festivals, and Dowson reviews

the literature in this area to come to an understanding as to the current state of knowledge of this field of research. Whilst acknowledging the body of literature that exists from various disciplines, Dowson highlights the silo nature of much of this research and the fact that many festival studies remain uninformed by a large body of research that exists outside the discipline of the individual researcher. Dowson concludes by proposing a series of issues that would benefit from future research in this area. Finally, White and Frew examine the festive aspects of national day celebrations, in this case Australia Day, considering the role that such celebrations play in forging community and national identity. Drawing on ideas from Falassi (1987), they use the rites that occur during festivals (such as the rites of reversal, conspicuous display, conspicuous consumption, drama, exchange and competition) to demonstrate how aspects of national day celebrations could be classified as festivals. They conclude by posing questions around why some celebrations and legacies of Australia Day continue to generate such distinct and unique festive meanings.

Cultural perspectives on festivals

Festivals are intimately connected with culture, whether that be in relation to high culture and the arts, local traditions and heritage, popular culture or ethnic culture. This section provides examples of festivals from different countries, each addressing specific issues that face the festival sector. Helgadóttir reports on the cultural sustainability of the *Laufskalarett*, a harvest festival in Iceland that celebrates the gathering of livestock (mostly horses) from summer pastures. Helgadóttir outlines a range of changes to the festival that have implications for how it is perceived by the locals who identify with it. These changes include increasing festivalisation of the horse gathering and changes in the lived experience of the community as they participate in their traditional event. Ghana is the location for the chapter by Akyeampong, who presents a discussion on the differences between a traditional festival which has been in place for over 200 years and a newer presentation of a traditional festival that only began in the past decade. Using a festival-as-product framework, the chapter identifies questions around the history and cultural practices at each festival. Moving to Mexico, Hernández-Escampa and Barrera-Fernández document the Guelagueta Festival and raise questions as to the role of tourism in relation to the pressure on the festival organisers to make changes to the traditional form and practices of the festival. While presenting a critique of the role of tourism in such changes, nonetheless, the authors suggest that paradoxically, the festival appears to represent a compromise between tradition and modernity as long as significant efforts are directed towards preserving what is considered genuine by the local community. Sharma presents an investigation of the role of festivals in sustainable tourism development in Rajasthan, India. Sharma is interested in clarifying the role of festivals in empowering communities and at the same time providing useful solutions for the challenges faced by festival organisers in remote and regional areas. The chapter argues that festivals are a key strategy in promoting those rural places that have suffered from underinvestment for long periods of time. Kaya Sayari and Gun offer an ethnographic investigation of the Water Festival in regional Turkey, drawing on the theoretical perspectives of habitus, doxa and heterotopia. Their conclusions show that for local residents, the boundaries between the festival event and their daily lives are porous, allowing for a reciprocal exchange of roles between insider and outsider, attendee and local. Finally, Kruger investigates the indigenous culture of Australia, using the case study of an Australian Aboriginal youth choir and focussing on the extent to which the *Yugambeh* Language and Song project facilitates the development of social capital and safeguards Aboriginal culture through performances at festivals.

Future of festivals

The final section of the handbook takes a look at some of the things that may be in store for festivals in the future. Peltz, Juneke and de Ross examine virtual reality (VR), with a particular interest in how it can be used to teach the students that are to become the festival organisers and managers of the future. The chapter investigates how VR can be implemented to improve the teaching of festival management skills and highlights some of the challenges for educators and students that arise as a result of using the technology. Bossey takes a look at the potential digital futures for live performances at music festivals, basing his chapter on interviews with key industry personnel. Amongst other trends discussed are livecasts, holograms and networked performances. Immersive futures, such as using VR or working with entirely virtual artistes are also considered, although they appear less popular with the industry stakeholders at present. Finally, Yeoman et al. envision the future of the Wellington on a Plate Festival by drawing parallels with a predicted future scenario for a food festival in Tuscany. Key trends that might inform this future include growing health consciousness and an increased drive towards healthy, sustainable and local food, which may attract a premium. Learnings for the Wellington on a Plate Festival, and for other similar festivals, emphasise the importance of authenticity, community and collaboration.

Conclusion

This chapter has set the scene for the remainder of the handbook, highlighting the multifaceted nature and role of festivals in our societies. As well as providing some guidance on the definition of festivals, the chapter has identified a range of functions undertaken by festivals, including the maintenance of heritage and tradition, the showcasing of communities, the provision of access to culture of varied types and the economic development imperative which is driving the establishment and extension of many festivals around the world.

The chapter has outlined the various contributions in the handbook and hopefully has whetted the reader's appetite to continue reading.

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2

METHODOLOGICAL APPROACHES TO FESTIVAL RESEARCH

Mary Beth Gouthro and Dorothy Fox

Introduction

When it was first published in 2014, the book *Doing Events Research: From Theory to Practice* (Fox, Gouthro, Morakabati & Brackstone 2014) was the first service-sector research text to focus on event and festival applications specifically. Up until that point, students studying events- and festival-related courses were typically drawn to the ‘sister’ courses of tourism, leisure and hospitality that had trusted sources (for example, Smith 2010; Veal 2011) to help shape their understanding and research approach. However, in the recent past, academic discussions and contributions across the festival context continue to grow and mature. The aim of this chapter is to reflect how festival research has advanced in the recent past and to identify the current state of play. Accordingly, academic journal articles in the festival field and the methods of research applied are considered, and an appreciation for trend(s) and void(s) of these contributions is also acknowledged.

Getz’s (2010) publication is particularly relevant in capturing the state of play of festival literature at that time. Using ontological mapping, the main concepts and themes were identified. Getz captures the focus of each study under the following ‘themes’: experiences, meanings and managing events (making up 367 of the 423 submissions), with design themes (14 submissions) and motivations and constraints (57 submissions) making up a smaller number of papers. Academic study of festivals continues to diversify, for example, given the digital age we live in, and through their inductive case study approach of consumers, Hudson and Hudson (2013, p. 221) point out the ‘high degree of sophistication’ related to the implementation of social media at music festivals. New methods relating to the digital age and its impacts on the festival experience are therefore developing. Adopting a broader scope, the work of Crowther, Bostock and Perry (2015) offers valuable reflection into how the methods of research applied in both events and festivals have evolved. This chapter continues the progress arguing for further depth across paradigms and showing how academic contributions can be enriched, thereby enabling insights into how society and culture may benefit from a broader perspective of the festival context. Finally, the discussion reflects on the value of robust methods and paradigms that can be considered in the future study of festivals, thereby allowing a wider reach in the potential for new knowledge.

Van Niekerk (2017) suggests that ‘Event and festival research is often criticized for the lack of rigorous research methods being used and the generalizability of the results’ (p. 843).

Previous reviews of published articles include studies on conventions (Lee & Back 2005; Yoo & Weber 2005), business events (Mair 2012) and events (Crowther et al. 2015), but to date there does not appear to be a comparable study of festivals. This chapter therefore begins by systematically capturing and appraising developments in research in the festival-sector literature during the period of 2012–2016.

Method of journal article analysis

Crowther et al. (2015, p. 99) adopted a purposive sampling strategy known as ‘critical case sample’ in order to select articles based on their importance in the field of events. For this chapter we are interested in the methodologies, so we sought all papers irrespective of their significance, and hence located as broad a range of festival articles in the social sciences as possible. As Crowther et al. (2015, p. 99) note, ‘Wider journals needed to be interrogated, particularly as the journal ranking system is not currently favourable to the dedicated event journals and many scholars understandably seek to publish elsewhere’.

A search was undertaken to locate English-language, peer-reviewed, full-text articles in academic journals to capture a picture over a period of five years from January 2012 to December 2016 with ‘event’, ‘festival’, ‘tourism’, ‘travel’, ‘leisure’, ‘hospitality’, ‘marketing’ or ‘management’ in the journal title and containing ‘festival’ in the abstract. Each article was checked to ensure that it contained empirical data and had some relevance, however broad, to the field of festival research, resulting in 159 articles to be examined in detail. Systematic textual analysis was undertaken to ascertain the type of festival and the country in which the research was undertaken and the research methods employed (Weber 1990).

Results

Year of publication

Figure 2.1 illustrates the number of articles in each of the five years of study, demonstrating that since 2012, the number of articles has increased from 25 to 31, 33, 33 and 37 in 2016.

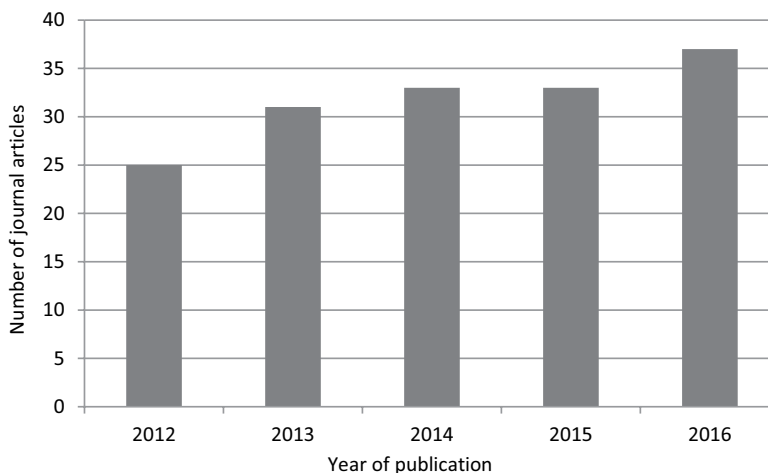


Figure 2.1 Number of journal articles by year of publication

Table 2.1 Number of articles by journal

<i>Journal</i>	<i>Number of articles</i>
<i>Event Management</i>	48
<i>Journal of Convention & Event Tourism</i>	14
<i>International Journal of Event and Festival Management</i>	11
<i>Tourism Management</i>	11
<i>International Journal of Tourism Research</i>	7
<i>Journal of Travel & Tourism Marketing</i>	6
<i>Leisure Studies</i>	6
<i>Journal of Sustainable Tourism</i>	5
<i>Scandinavian Journal of Hospitality & Tourism</i>	5
<i>International Journal of Arts Management</i>	3
<i>Journal of Hospitality Marketing & Management</i>	3
<i>Journal of Travel Research</i>	3
<i>Annals of Tourism Research</i>	3

Journal

A total of 39 journals were located containing an article, of which 19 had published just one article and 6 journals had published only two. Table 2.1 lists the remaining journals, demonstrating that three journals published almost half of the articles, of which the largest number (48) is in *Event Management* (formerly titled *Festival Management and Event Tourism*). This repeats Getz's (2010) study, in which *Event Management* was also the principal journal for festival articles. A further 15 articles in our study are in the *International Journal of Event and Festival Management* and 14 in the *Journal of Convention & Event Tourism*. This rise in publications in specialist event journals is confirmed by the decrease in publications in the *Journal of Travel Research* (from 31 in 2010 to 3 in this study) and *Tourism Management* (from 17 to 11).

Festival location

The country in which the data were collected was recorded, and in total, festival research has been undertaken in 33 different countries over the five-year period. Of these, 20 countries were represented in only one or two articles, and Table 2.2 shows those countries with three or more publications. The most frequent studies were of festivals in the USA (35) and Australia (18); no doubt reflecting not only the long history of festivals in those countries but also that the articles reviewed were limited to those in the English language. Seven of the researchers undertook their data collection in more than one country. For example, Hudson and Hudson (2013) analysed the use of social media at two music festivals in the USA and one in the UK. Gyimóthy and Larson (2015) carried out a comparative analysis of the management practices of social media using Roskilde Festival in Denmark and the Way Out West and Storsjöyran music festivals in Sweden.

Type of festival

Many of the studies were undertaken at a single festival (see Table 2.3). The largest group of the particular categories of festivals where data were collected was at cultural and a range of

Table 2.2 Number of articles by festival country

<i>Country</i>	<i>Number of articles</i>
USA	35
Australia	18
China	13
UK	12
South Korea	11
Italy	8
Finland	6
South Africa	5
Sweden	5
Taiwan	4
United Arab Emirates	4
Spain	3
Turkey	3

Table 2.3 Number of articles by type of festival

<i>Type of Festival</i>	<i>Number of articles</i>
Cultural and other miscellaneous festivals	51
Music	46
Food and drink (including wine)	23
Film	7
Arts	5
Shopping	5
Multiple festivals	22
Total	157

other miscellaneous festivals (51). The next largest groups were music festivals (46) and food and drink (including wine) festivals (23). However, 22 articles are based on data collected from more than one specific event. For example, Oh and Lee (2012) collected their survey data at an airport in South Korea from domestic tourists, in relation to 17 island festivals held on Jeju. The most visited of these was the Rapeflower Festival with almost three quarters of the respondents aware of it, but less than a quarter who attended it.

Research participants

The majority of research participants were festival attendees, who were the participants in 90 (56.6%) of the articles reviewed. A variation on this sample group was that of Lei and Zhao (2012) who made statistical comparisons between three groups of respondents in relation to the 2009 Macao Arts Festival. The first group were residents who were attendees that year, the second group were residents who had never attended and the third were also residents but who had attended in previous years but not in 2009.

Other participants included the festival management (for example, Luonila, Suomi & Johansson 2016) who conducted interviews with the managers of three festivals regarding ‘Word of Mouth’ (WOM) in relation to the festival marketing practices. In some,

a broader range of stakeholders are studied; for example, Alonso and Bressan (2013) focussed on the stakeholders on the supply side of a traditional wine festival (The Festa dell'Uva in Impruneta, Italy), and so their participants included 12 owners of local wineries and 5 restaurateurs/hoteliars.

Residents have also been the subjects of festival research (in eight articles), for example, Lei and Zhao (2012) considered the residents to the Macao Arts Festival, as discussed earlier. Festival volunteers were the participants in seven studies; an interesting example is that of Clayton (2016) who undertook a hermeneutic-phenomenological exploration of the volunteers' experiences at UK music festivals.

Research chronology

With the exception of one paper, all the studies were cross-sectional, that is undertaken in one period of time. The example of a study that was longitudinal was the work of Andersson, Jutbring and Lundberg (2013) who surveyed two different groups of attendees of the Swedish festival 'Way Out West' in 2010 and 2012 and then compared their consumption and ecological footprints.

Approach and method

'The research approach employed by researchers directly shapes the knowledge generated' (Crowther et al. 2015, p. 94). The majority of studies were quantitative ($n = 112$; 70.4%), and of these, most used a survey instrument. A typical example is Kruger, Botha and Saayman's (2012) study of information source preferences and associated expenditure of attendees at the Wacky Wine Festival in South Africa. Their self-administered questionnaire was divided into three sections: first demographic data; second 'motivational factors, other festivals attended and media usage' (p. 347); and a third section which was not used in the published study. The motivation section included 22 items, measured on a 5-point Likert scale, where 1 = not at all important through to 5 = extremely important.

Of the remaining studies, 36 were qualitative and the remaining 11 adopted a mixed approach. Alonso and Bressan (2013) used a combination of structured interviews (a mix of telephone and face to face) and a questionnaire, which contained the same questions and then analysed the data using content analysis and word association which were 'used to separate and group different emerging comments and words according to the theme' (p. 317).

Innovative methodologies

Having identified earlier the principle features of recent festival research studies, we next consider some of the more innovative methods used. As demonstrated earlier and reiterated by Mair and Whitford (2013, p. 4), research into festivals 'continues to escalate exponentially' – offering opportunities for innovative methods as well as new areas of research.

A rare mixed method approach was adopted at the Parkes Elvis Festival (Jonson, Small, Foley & Schlenker 2015). After a questionnaire was completed by 371 festival participants, a memory work study (Haug 1987, cited in Jonson et al. 2015) was conducted to describe the play aspects of the festival. This involved the four Australian researchers, who were all familiar with the singer Elvis Presley but had never attended an Elvis Festival before, writing a memory 'in the third person, in as much detail as possible, and without interpretation ... [about] "Play at the Parkes Elvis Festival"' (p. 486). They then met together to read and

discuss the memories, identifying ‘their shared social understandings and themes’ (ibid.) in relation to academic theory. The integration of the two methods is illustrated by this quote from their results:

When presenting survey participants with the motivational options, [participants] would be... listening, nodding and then when you [would] say “to play and have fun”... people’s faces would light up and they’d say, “Oh yeah! To play and have fun. That one [that ‘play and have fun’ option]! That’s what I’m doing!”

(p. 487)

An unusual technique was employed by Van Winkle and Falk (2015), who adopted Personal Meaning Mapping (PMM) for their study of two film festivals in the USA. This technique involved the participants being requested to ‘write down any ideas, images, words, or thoughts that come to mind when you think about your festival experience’ (p. 147). Once analysed, the findings showed that the participants had communicated ‘affective and cognitive elements, functional and hedonistic components, and personal, social, cultural, and physical festival experiences’ (p. 147).

Another effective, but rarely adopted, qualitative technique was employed as one of three methods of data collection by Kinnunen and Haahti (2015) in their study of cultural festivals in Finland. The Method of Empathy-Based Stories (MEBS) developed by Eskola (1988) is a non-active role-playing technique in which the participant is given a frame story and asked to write a short narrative about it in less than 20 minutes. Frame stories in Kinnunen and Haahti’s study included one about a very successful festival in the near future; second, a similar festival in 2027; and third, a festival in 2015 that was ‘considered a major disappointment’ (p. 255). The data were then analysed using discourse analysis. The authors concluded that MEBS ‘served to unfold the significance of the experiences for the cultural festival visitors’ (p. 264).

Gyimóthy and Larson (2015) began their study of music festivals, by first undertaking three focus groups and then three in-depth interviews with festival managers including those responsible for the social media and other forms of communication. A second qualitative stage followed in which the organizations’ social media communications were analysed using a netnographic approach. A third sequential stage involved a quantitative analysis which, amongst other aspects, measured the frequency of postings and demonstrated the fluctuations during a period of 12 months.

A final interesting example of innovative methodology is the work of Luxford and Dickinson (2015). They incorporated primary data from focus groups of festival consumers and secondary data from nine apps. The latter provided ‘base-line knowledge of the current available features and issues with the apps that assisted in the design of a focus group protocol’ (p. 37).

Methodological trends

The chapter does not have the scope to delve into a lengthy analytical discussion of the literature in its entirety, yet a main aim of it is to highlight some of the timely themes that surface in these academic discussions. This too can be framed given the current academic climate of neoliberalist ideals (Fletcher, Carnicelli, Lawrence & Snape 2017), and the associated value(s) thereby attached to the creation of certain knowledge. The literature scan discussed earlier clearly shows the predominance of quantitative discussions of research. Whilst the papers

that adopt qualitative work are smaller in number, they nonetheless merit similar credit for the new knowledge they create. An example of quantitative festival research that seeks to measure well-being in society, e.g. psychological, social and subjective elements, is that of Ballantyne, Ballantyne and Packer (2014), who apply Confirmatory Factor Analysis to their data. Independent variables, e.g. gender and length of attendance, were subject to a further series of statistical tests: two-way Analyses of Variance (ANOVAs) and 'a stepwise regression analysis as predictors of the composite benefit scale' (Ballantyne et al. 2014, p. 79). The point to illuminate in this is to reiterate the range of statistical tests that festival data are often subject to in research. The study also acknowledges that further qualitative research should be undertaken 'to explore and understand the processes through which music festivals contribute positively to the psychological and social well-being of those who attend' (Ballantyne et al. 2014, p. 81).

Relevant to this, the work of Hudson, Roth, Madden and Hudson (2015) is important in the festival research discussions for several reasons. It combines insight into the relationships between social media and 'festival' brands per se, and how the consumers feel about these interactions. It adopts a quantitative approach to its data collection, which, as shown earlier, is not untypical, and sheds light into some valuable perspectives as a result. It employs a survey instrument that is informed by a 'quota-type sampling scheme' (Hudson et al. 2015). The 'emotion' element of the study adopts a ten-item scale from Thomson, MacInnis and Park (2005) and a scale for Brand Relationship Quality (BRQ) (Fournier 1994; Smit, Bronner & Tolboom 2007 cited in Hudson et al. 2015) and again proves useful in identifying feelings towards the brand by attendees at music festivals. It is equally useful to note that Hudson et al. (2015, p. 74) applied hypotheses testing to the research, supporting notions that 'social media had a direct effect on emotional attachment to the festival, and emotional attachment has a direct effect on word of mouth'. The study, however, found no direct relationship between social media usage and BRQ. In essence, the study validates that 'if marketers wish to build strong brand relationships, they need to incorporate high levels of emotional content in their marketing communications' (Hudson et al. 2015, p. 74). The authors rightfully acknowledge that by way of future research, 'the merits of social media investments' would benefit from further study in varying contexts, e.g. in other countries, cultural contexts and demographic mixes. They do, however, fall short of recommending differing types of methodologies or paradigm concepts that could be applied.

Comparatively, earlier research conducted by Hudson and Hudson (2013) was a qualitative study to examine social media engagement for its role in the consumer decision-making process of festivalgoers. It adopted a case-study methodology and an ethnographic approach to three festivals: Bonnaroo (Tennessee), Lollapalooza (Chicago) and Latitude (Suffolk, UK). Unlike the 2015 work discussed previously, for which S. Hudson and R. Hudson were two of the four authors who contributed to it, their 2013 qualitative study was not published in a high-ranking journal as assessed by the Association of Business Schools (ABS) but rather in a lower-ranked journal. The methods applied in each merit comparing/contrasting for their role in knowledge creation, yet the prevalence of quantitative methods in academic accounts of festival 'insights' in higher-ranking journals is highlighted here. In any case, Hudson and Hudson's study (2013, p. 220) offers comprehensive insight into festival perspectives whereby 'the touch points when consumers are most open to influence have changed, requiring a major adjustment to realign marketers' strategy and budgets with where consumers are actually spending their time'.

A recent case study by Maeng, Jang and Li (2016) argues that the motivational factors applied to festival studies are in need of brand-new measurement scales. Based on a

meta-analysis of 46 specific journal contributions, they concluded that ‘major festival attendance motivation has been borrowed from studies of tourism motivation’ (Maeng et al. 2016, p. 22). New ways of thinking about approaches to festival research are brought to the fore.

Philosophical approaches

Crowther et al. (2015, p. 94) observe ‘a general absence of transparency in event articles relating to the authors’ philosophical and methodological commitments’ whilst at the same time taking on a subjectivist perspective themselves and one where reality is socially constructed. Similarly, Dredge and Whitford (2010) warned that positivist perspectives in ‘event’ (and thereby by default festival) research ‘underpinned by a belief in rational-technical approach to policy-making and implementation’ (2010, p. 3) are at risk of falling short in what can be known/informed about knowledge creation in festival research. In that vein, Dredge and Whitford (2010, p. 5) qualify this with ‘ours is a post-structural view of the world, where multiple approaches and perspectives are able to co-exist’. That is to say that universal or generalised forms of data/application may not always suit, and contextual circumstances, e.g. location and cultural history have a place in the research frame, and value of knowledge creation.

Fletcher et al. (2017, p. 300) have acknowledged that ‘higher education in the UK is increasingly shaped by a culture of audit and quantification’ and analogous developments can be observed in other western countries. Such ideals filter into related discussions of knowledge creation, whereby similar trends are observed in this chapter and thus impact on trends in festival research. Indeed ‘the social sciences as a whole are threatened by a neoliberal economic discourse which increasingly informs HE strategic management’ (Fletcher et al. 2017, p. 294). The related knock-on effect starts to shape some accepted forms of knowledge over others.

Priorities for future research

Getz, Andersson and Carlsen (2010) proposed a framework and priorities for festival management studies. It drew from a cross-cultural comparative study applying the same research instrument at festivals in four different countries, i.e. UK, Sweden, Norway and Australia. In terms of its research methodology, it presents an analysis of variables, first between the management functions of the festivals, e.g. revenues, demographics and stakeholders – in that ‘only those differences that were found to be statistically significant at 0.01 or 0.05 levels of probability are included in the analysis of the paper’ (Getz et al. 2010, p. 37). We highlight this so that the research instrument in this work is understood for its function and purpose – and ultimately the descriptive nature of the findings. The resulting application of descriptive statistics and thereby lack of alternative paradigms to festival research are furthermore exposed. In Getz et al.’s concluding comments, the possibilities for future research are, however, acknowledged, stating there is a need for ‘greater understanding of antecedents and constraints in different [festival] cultures and settings...the social/cultural and environmental outcome research is in need of considerable advancement both methodologically and theoretically’ (Getz et al. 2010, p. 55).

There is, however, optimism for future research developments. Yeoman, Robertson, McMahon-Beattie and Musarurwa (2014) provide some thoughts on consumer trends influencing festivals in the future. The trends identified include everyday exceptional, magic nostalgia, leisure upgrade, mobile living, performative leisure, authentic experiences,

affluence, ageless society, consuming with ethics and accumulation of social capital. Although new methodological forms of research are not put forward, it does demonstrate the evolution of festivals and events, and remains noteworthy for shaping areas of future festival research.

In the UK, the Arts and Humanities Research Council (AHRC) commissioned a study (Webster & McKay 2016) that gives credence to academic contributions to festival research. The authors compiled a literature review that included perspectives on the impact of academic research on music festivals and recommendations for future research. As they highlight, festivals are used 'as vehicles to educate the public beyond simply music... [and have also] been sites for public engagement and knowledge exchange, academic research and knowledge exchange' (Webster & McKay 2016, p. 20). The report goes on to recommend developments in festival studies that are 'co-produced research between festival organisations and academic researchers' and 'work on new theorisations and critical approaches to festival culture' (Webster & McKay 2016, p. 21). Building on his extensive repertoire of festival research, Getz (2010, p. 20) has suggested that 'most of what we know about festival experiences, and the meanings attached, is drawn from the classical discourse and disciplines of cultural anthropology and sociology'. This shows scope for further insight beyond academic discussions of, for example, economic impacts of festivals.

Conclusion

This chapter has demonstrated the breadth of festival research undertaken throughout the world in the recent past. It has highlighted the dominance of quantitative methods particularly using surveys to gather data. Nonetheless, we have shown that qualitative methods of research are receiving greater acceptance in a range of journals, and we have presented some of the more pioneering techniques adopted. However, there are challenges ahead in festival research, for example, in relation to data, the requirements for data protection especially in relation to ‘big data’. Furthermore, we have not considered the ethics of research, which is an issue of increasing concern to both academics and the participants of their studies. Of equal concern is how the academic community may be influenced by the demands of governmental monitoring and measurements. To this end, it is the hope of the authors that this chapter helps to capture a meaningful account of trends in current festival research.

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3

THE VALUE OF FESTIVALS

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Introduction

This chapter addresses the conceptual and philosophical issues associated with placing a value on a festival from many perspectives. The emphasis is placed on providing a theoretical and practical framework within which value issues can be addressed, and further research suggested. Our approach is derived from the edited book *The Value of Events* (Lundberg, Armbrrecht, Andersson & Getz 2017). The starting point is definitional, looking at the key terms, then providing a framework for exploring value perspectives. In the concluding section we identify gaps and suggest a research agenda.

Building a framework

Brown, Getz, Pettersson and Wallstam (2015) carefully examined definitions and usages of 'value' and related terminology. Important synonyms for the noun 'value' include worth, utility, advantage, benefit, profit, merit and usefulness. These suggest how the value of an event might be determined, but raise the questions 'by whom' and 'from whose perspective'? Accordingly, evaluations need to be clear about both the 'subject' and the 'object' of analysis (Andersson & Armbrrecht 2017). Valuation is also implicit in discussions of festival impacts, although this requires an indication of whether or not an identified or imputed impact is good, bad or neutral, and from whose perspective.

One meaning of 'value' pertains to a person's or group's values, based on culture and ethics, and influencing what a person becomes and does. In this sense, values determine (at least in part) attitudes towards festivals and influence what a group or society does by way of organising and facilitating (or regulating) planned events. McCarthy, Ondaatje, Laura and Brooks (2004) distinguished between *private* and *public value* and the *extrinsic* and *intrinsic value* dimensions. Intrinsic value is derived from intellectual, emotional and spiritual experiences and relates to the notion that something is valuable in itself. Extrinsic value stems from utility and exchanges that provide tangible benefits or value either to individuals (including social groups and subcultures) or to society as a whole.

Andersson, Armbrrecht and Lundberg (2012) have provided a pertinent framework (see Figure 3.1). The vertical axis distinguishes between the intrinsic and extrinsic value

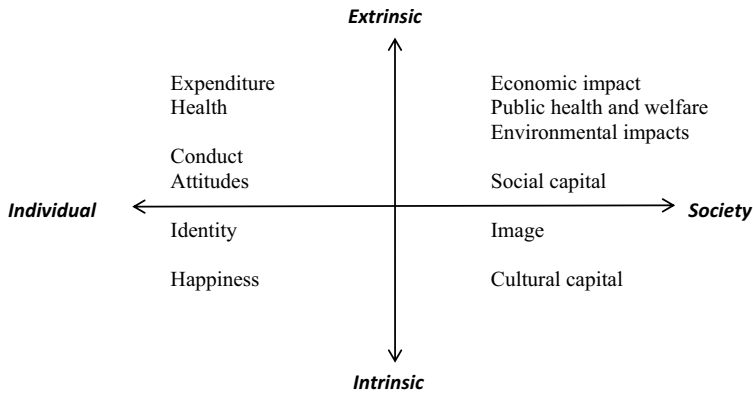


Figure 3.1 A two-dimensional illustration of major festival impacts

Source: cf. McCarthy et al. 2004; Armbrecht 2009.

perspectives, while the horizontal axis separates individual versus societal values. Note that ‘impacts’ in this model can be interpreted as potential positive and negative values attributed to festivals.

Metrics

Measurement of intrinsic value is often resisted but can be approached through measures such as willingness to pay valuation, or by relying upon the opinions and attitudes of stakeholders. Indeed, surveys of visitors’ and local residents’ impact perceptions and attitudes towards events are a standard form of value measurement (e.g. Delamere, Wankel & Hinch 2001; Fredline, Jago & Deery 2003; Small 2007; Woosnam, Van Winkle & An 2013). Claims are often made that culture or the arts do not require justification; therefore festivals should be judged worthwhile without resort to metrics. This is a controversial position to take, especially when the countervailing argument is that culture has major economic impact; in that context, many festivals have conducted economic impact studies.

Logically, both costs and negative impacts should be taken into consideration when assigning worth intrinsically or calculating a quantitative measure of value (see, for example, Deery & Jago 2010 for a comparison of benefits and costs), but this is not always done. Those promoting a festival might be attitudinally ‘blind’ to costs or any criticism, while impact forecasts and post-event assessments too often ignore externalities such as pollution, security, or inflation; opportunity costs are seldom weighed up. Little is known about long-term cumulative festival and event impacts or the synergistic effects of managed portfolios. The study of whole populations of festivals and events is in its infancy (Andersson, Getz & Mykletun 2013; Getz & Andersson 2016).

To ‘prove’ an impact requires strong evidence, even experiments, to demonstrate cause and effect, and this is seldom possible. As well, many of the imputed roles of festivals, particularly related to society and culture, are therefore highly subjective.

Synergies

Portfolios of festivals, managed for policy and strategy, present opportunities for synergies and long-term sustainability. Whereas one festival can enhance a city’s image or help in its