2

METHODOLOGICAL APPROACHES TO FESTIVAL RESEARCH

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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).
Methodological approaches to festival research

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](image-url)
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
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/hoteliers.

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 Anderson, 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.

References


Methodological approaches to festival research