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Event and festival research: a review and research directions

Events and festivals are key elements of the tourism product in many destinations (Getz and Page, 2016). The ability of festivals and events to attract visitors to a host region, and to contribute to its economic and social well-being explains the significance afforded to them in many tourism policies and strategies (Mair and Whitford, 2013). This contribution is a strong justification for public funding of events and festivals (Felsenstein and Fleischer, 2003; O’Hagan, 1992). Thus, in conjunction with tourism, they are becoming a realistic policy option for regional development (Moscardo, 2007; Robinson et al., 2004). However, the rapid growth of the events/festival industry in the past few decades has not always been matched with the level of research devoted to investigating it. Additionally, the fragmented nature of the research that exists poses challenges for researchers and practitioners trying to identify both the existing knowledge and any research gaps. Nonetheless, the interest of the academic community in event and festival research has increased significantly, particularly in the past decade. This has broadly aligned with the time that the *International Journal of Event and Festival Management* has been in existence. Here we look back on the general direction of research in our field and provide some potential avenues for future research to strengthen and enrich event and festival research.

To date, several reviews have examined the state of research relating to festivals and events. Getz (2010) reviewed the literature on festivals, identifying three major discourses – 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 focuses on the production and marketing of festivals and the management of festival organisations (Getz, 2010). Getz and Page (2016) also reviewed the event tourism literature. According to Getz (2013), there are five core propositions of event tourism: events can attract visitors who may not otherwise visit the area; events can create a positive destination image and branding; events contribute to place marketing by making destinations more attractive; events animate cities, resorts and parks; and event tourism is a catalyst for other forms of development. A more recent review of trends in event management research was published in 2017, highlighting the themes which appeared to represent the most popular research topics over the period from 1998 until 2013 in studies published in leading hospitality and tourism as well as event-focused academic journals (Park and Park, 2017). A total of 698 articles were analysed and results showed that the most popular research topics were marketing, events and destinations and management. Planning and evaluation of events along with the use of technology in events were also well represented in this sample. However, events education and human resources in events appeared to be less well researched (Park and Park, 2017). Other reviews have been completed in the area of festivals, but they have been limited by a focus on papers published in journals associated with one discipline or field of study only. For example, Cudny (2014) took a geographical perspective and Frost (2015) reviewed anthropological studies of festivals, which broadly position festivals as sites of cultural practice and experience. However, neither addressed festival management issues.

The literature on events and festivals has been approached from a number of theoretical perspectives. Initially, cultural and social research predominated. However, more recently far more research has taken a business orientation, focusing on themes such as management, marketing and tourism, as noted by Park and Park (2017).
Festivals/events and tourism

The links between events (particularly festivals) and tourism have been a fertile area for research. Increasing tourism is one of the key reasons why local governments support and stage festivals (Mayfield and Crompton, 1995), and according to Anderssen and Getz (2009), many destinations view festivals as attractions and use them as part of their destination marketing strategy. There are clear benefits to hosting festivals, primarily in terms of economic but also social benefits. In relation to economic benefits, increasing visitor numbers, supporting job creation and underpinning economic development appear to be the main positive impacts of festivals; however, the extent of such positive impacts is disputed in relation to whether festivals actually attract visitors (McKercher et al., 2006); whether visitors are even aware of festivals when they make their destination decision (Oh and Lee, 2012); and whether festival visitors, many of whom camp and eat on the festival site, are actually making much economic contribution at all (Saleh and Ryan, 2003). Further, in relation to social benefits such as community cohesion, sense of place, belonging and identity, the literature appears somewhat contrary. While there is plenty of evidence to suggest that these are the objectives of festival organisers, funding bodies and local authorities, there appears to be less evidence of whether festivals are successful in achieving these objectives, and through which mechanisms this may be facilitated. Further, while festivals have unique features and cultural dimensions which are also important factors for attracting tourists, the importance of exercising caution when using tangible or intangible historic and cultural resources for festival activities seems to be less acknowledged. Therefore, while the potential benefits of festivals have been clearly outlined, research appears to be lacking in terms of truly comprehending how best to achieve these desired benefits.

Festivals/events and marketing

There is also a significant body of work that examines events/festivals and marketing, with this topic representing the most widely researched theme identified by Park and Park (2017). Drawing on initial work by Crompton and McKay (1997), who proposed six key motivational dimensions to explain festival attendance, researchers have examined attendance motivations in a multitude of contexts, yet for the most part, few significant differences have been found. Existing reviews have already ascertained that attendance motivations have been thoroughly researched (Getz, 2010); yet, studies continue to be published in this topic. For example, while there have been some minor differences to the original Crompton and McKay (1997) motivation framework, the underlying dimensions appear to be relatively stable over time and across a variety of contexts. Nonetheless, each year more studies appear testing these dimensions in yet more contexts.

Similarly, an established body of research has concluded that good quality festivals result in attendee satisfaction, which then leads to increased loyalty in the form of future re-purchase intentions (see for example, Anil, 2012; Cole and Illum, 2006; Cole and Chancellor, 2009; Lee et al., 2007; Son and Lee, 2011; Mason and Nassivera, 2013). Nevertheless, despite this literature, studies examining the relationship between satisfaction, quality and loyalty continue to be published. Finally, market segmentation studies occur frequently in the festival literature, yet as most are case study based, they are failing to make generalisable contributions to our knowledge of this area. In summary, it appears that in these areas, researchers have simply been making only small, incremental contributions.

Several issues have arisen in relation to festival marketing and consumer behaviour which would present useful opportunities for further study. For example, the decision-making process of festival goers requires more research, as much of this research to date has been undertaken in case study contexts, without further generalisation (e.g. Kruger and Saayman, 2012). Further, there is a noticeable lack of research in areas of marketing that more recently gained greater popularity, including experiential marketing, and very little research on the
role of social media and events. Experiential marketing focuses primarily on helping consumers to experience a brand, with the goal of forming a memorable connection and an expected outcome of future purchases and brand loyalty. Festivals offer an unrivalled opportunity for organisations to showcase their brands and build a connection in the mind of the consumer between the festival experience and the brand experience, as noted by Chen et al. (2011), yet this is a relatively unexplored area where future research should be carried out.

Social media has also been the focus of surprisingly few festival studies thus far. This is particularly unexpected given the widespread use of various types of social media and its obvious links with marketing. In a case study of music festivals, Hudson and Hudson (2013) carried out some pioneering work to understand how festival organisers are engaging with both social media and their consumers. Their findings suggest that music festival organisers are proactive in using social media. In a subsequent study, Hudson et al. (2015) developed a conceptual model that was subsequently tested with music festival attendees. Study findings provided evidence that social media do indeed have a significant influence on emotions and attachments to festival brands, and that social media-based relationships lead to desired outcomes such as positive word of mouth. Montanari et al. (2013) examine an Italian photography festival, and revealed how using social media and Web 2.0 technology enhanced the way the festival was able to communicate with its audience. Social media is also changing the way potential attendees make their attendance decision. Lee et al. (2012) investigated whether engagement with a festival “event” page on Facebook was linked with actual attendance at the festival. They found some evidence to suggest that the event Facebook page stimulated emotions and a desire to attend the actual festival. Research by Williams et al. (2015) suggests that festivals are both generators and animators of electronic word of mouth, but the authors acknowledge the exploratory nature of their research. Sigala (2018a, b) has advanced our conceptual knowledge of social media as it relates to both festival management and marketing, creating a typology of the way that social media is being used in festival management and organisation. She also drew attention to the use and influence of social media on both attendee experiences and decision making and festival marketing strategies. In view of the omnipresent nature of social media, this is an area where there is a considerable need for further research in the festival context; there is ample room for new studies relating to social media to bring theory development and practical implications.

Technology mediated experiences are changing the festivalscape as events and festivals integrate hardware, software, netware and humanware into the attendee experience (Neuhofer et al., 2014; Robertson et al., 2015; Van Winkle et al., 2018). ICT has been used at events and festivals for utilitarian and hedonic purposes yet little is known about the implications for the events, attendees, volunteers and other stakeholders. Thus, research into the integration of ICT into the administration, design, marketing, operations and risk management of events and festivals is essential. An upcoming special issue of IJEFM will focus on these key issues.

Festivals/events and management

Three key aspects of strategic festival management have received significant attention from researchers – stakeholder management; festival success factors and conversely, festival failures; and festivals and environmental sustainability. The importance of understanding and managing stakeholders is widely acknowledged (e.g. Reid, 2007), and it may very well be that further research will simply underline this. However, in relation to other aspects of management, there are certainly areas where more research is required. For example, whilst knowledge transfer appears to be taking place in successful festivals (Stadler et al., 2014), transfer of knowledge is not well defined, or even explicitly acknowledged. Interestingly, festival failure has apparently been the subject of more research than festival success but further areas for useful contributions remain. These include succession planning and risk
management. In addition, differences in strategic management planning and operations between festivals under different types of ownership appear significantly under-researched (Andersson and Getz, 2009; Carlsen and Andersson 2011). Despite a few studies (e.g. Robertson and Yeoman, 2014; Yeoman, 2013), there have also been few attempts to foresee future trends and issues that are likely to affect festivals and their management.

Getz and Page (2016) also argue for further research to better understand the role that festivals play in bringing together disparate groups such as visitors and residents. Complex relationships between communal identity and place emerge as people have various sets of connections to multiple notions of “place” and “home”. This is an area where social science research could play an important role, bringing together the business aspects of tourism and festival management with the issues of place, space and people researched by geographers and social scientists.

There is also a small but growing body of knowledge on festivals and sustainability; however, this topical area offers considerable potential for future research, and ample room for further theoretical and practical contributions. Research attention may be placed on issues such as the triple bottom line, links between festivals and social sustainability, and even the opportunities for festivals to play an education and behaviour change role in relation to pro-environmental behaviour. For example, Andersson and Lundberg (2013) considered the notion of commensurability and proposed a framework for assessing the overall TBL sustainability of a festival by allocating a monetary value to each component. This is done using market values of emission rights, the shadow costs of environmental resources, contingent valuation analysis of (willingness to pay for) socio-cultural impacts and estimates of direct expenditure and opportunity cost. However, the authors acknowledge that there are aspects of their framework which are subjective, and they note that future research is needed to clarify the generalisability of their framework. Duran et al. (2014) also propose a framework – the Sustainable Festival Management Model – which highlights that stakeholder participation, especially non-governmental organisations, the tourism sector and local people who might be impacted by the festival, is vital for the development of a sustainable festival. Van Niekerk and Coetzee (2011) used the VICE model (visitor, industry community and environment) to assess the sustainability of an arts festival in South Africa and suggest that this framework can help to identify critical issues relating to a festival and its sustainability. However, they also note that research using this model is somewhat limited in the events context and that further research on the efficacy and usefulness of the model is required (Van Niekerk and Coetzee, 2011).

Implications for future festival/event research
There are several implications for future festival/event research resulting from the brief overview provided. These can be classified as opportunities for interdisciplinary research, a reliance on the western perspective and a corresponding lack of different cultural perspectives, an absence of research into the pedagogy of festival/event studies and finally, an array of limitations associated with the current body of knowledge.

First, there is a lack of interdisciplinary work that incorporates business and social and/or spatial perspectives. In his review, Getz (2010) highlighted that the classical discourse was under-acknowledged in extant festival studies, and that more connections should be made between festival studies and other disciplines such as sociology and anthropology. Further, Cudny (2014) called for more theoretical research to underpin the development of festival studies in future. Much of the work that has taken a business perspective, perhaps not surprisingly, has focused inwards on the festival – how to market, manage, stage it and provide a good quality service and experience (see Park and Park, 2017). However, very little of the festival research appearing in the business literature has been outwardly focused – considering how festivals may be mechanisms for
achieving other aims – social, cultural, political, behavioural, etc. Clearly, in order to survive, festivals have to be successful business products, but in order to achieve other objectives, managers need to be aware of some of the issues that are explored in the social sciences and humanities literature, such as inclusion vs exclusion at festivals, festivals and authenticity/tradition, and festivals as spaces of protest, counterculture and self-expression, to name but a few. Interdisciplinary work, using theories and concepts from beyond business disciplines (e.g. social capital, affect and emotion theories and Florida’s (2002, 2003) creative industries framework) would inform festival research, and while the majority of recent work being published on festivals has appeared in journals associated with tourism, events and business more broadly, applying other disciplinary theories and frameworks would bring these to a new audience and thus, help to make a greater contribution.

Second, there is a dearth of different cultural perspectives in festival and event research. While already highlighted by Getz (2010), it appears that researchers have not paid much heed to his call for comparative and cross-cultural studies. There is a need to move away from Western paradigms when examining non-Western phenomena. For example, Pine (2002) suggested that the development policy of hotel groups or chains established in China needs to consider the Chinese socio-economic context, thus implying that a research model should be developed specifically for China hotel development. China’s hotel industry is different from that of other countries due to fierce competition, multiform ownership and management systems, and coupled with China’s unique culture society might require a different research approach. Similar considerations would be of value in relation to festivals research in other non-western contexts. In a similar vein, the number of countries with resident populations that are culturally diverse has led to an awareness of the importance of building well-organised, multicultural societies (Chin, 1992; Lee et al., 2012; Parekh, 2006). Festivals can play a significant role in this. Multicultural festivals are especially important for minority groups seeking to maintain cultural traditions (Lee et al., 2012). However, despite some initial research in this area, further detailed study of the nature of festivals in a multicultural society would be of tremendous value.

Third, there are no pedagogical articles specifically related to festival studies. There is a relatively limited body of knowledge relating to teaching event management. For example Getz (2010) highlights that events students should learn and be able to apply both event specific knowledge (such as understanding the meaning, importance and impacts of festivals and events, and in addition their limited duration and episodic nature) as well as management specific knowledge including marketing, finance and accounting. Additionally, initiatives such as the development of the International Event Management Body of Knowledge seek to define research and understand the parameters of events and the knowledge, understanding and skills required in order to succeed in a contemporary environment (Silvers et al., 2005). Nonetheless, the pedagogy of festival and event studies remains an important, yet significantly under-researched area.

Finally, there are a number of limitations relating to the existing body of festival/event literature. Reminiscent of other review papers in the broader tourism and hospitality context, and beyond (e.g. Denizci Guillet and Mohammed, 2015; Kong and Cheung, 2009; Mattila, 2004; Yoo and Weber, 2005), the vast majority of papers relating to festival/event research are empirical rather than conceptual and theoretical in nature. In addition, as has been noted already, much of the research in the field of festivals has taken a case study approach. This has arguably limited the scope and scale of our knowledge of festivals. More sophisticated methods, both qualitative and quantitative, would provide a more nuanced study of particular festivals and places, yet at the same time contribute further to advancing our theoretical and practical knowledge of festivals.
Given this, a call for greater theory development and testing within the festival context appears timely. This is in line with Oh et al. (2004, p. 441) who note that “[…] applications are not a wrong effort to make; what is needed is a stronger conceptual rigour and meaningful contribution [to] back to the mainstream theoretical thought through creative application and domain-specific theory development activities.”

References


Judith Mair and Karin Weber


Further reading


Uncovering the factors impacting visitor’s satisfaction: evidence from a portfolio of events

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Abstract
Purpose – The purpose of this paper is to get insights on a real-life portfolio of events from a demand-centred prospective, based on the identification of factors influencing the degree of attendee’s satisfaction, with the ultimate aim of identifying commonalities and prospective cross-leverage strategies among events.

Design/methodology/approach – Data from attendees to three major events taking place in Funchal, the capital city of Madeira, were analysed based on multivariate statistics and categorical regression owing to the overwhelming presence of categorical data in the database. The econometric analysis pursued in this paper is based on a sample of 1,830 tourists.

Findings – The research demonstrates that the impact of the socio-economic variables and travel arrangements on attendees’ satisfaction is rather irrelevant, irrespective of the event under analysis, with cross-cutting factors defining the overall quality of any event (mainly technical aspects such as aesthetical elements, organization and opening hours) determinant in predicting the overall degree of satisfaction. Another key finding relates to the existence of a number of commonalities among events, in terms of tourists’ profiles, market orientation, themes and resources laying ground to define ready-to-apply cross-leverage strategies.

Research limitations/implications – The analysis concentrated on three major events taking place in the capital city of a peripheral region. The content of the questionnaire co-developed with the destination management organization with order to get access to a large sample of respondents.

Practical implications – Lessons to be learnt in terms of managing a disparate collection of events developed over time in an ad hoc manner. A few examples of cross-leverage strategies are put forward.

Originality/value – The analysis and empirical content portrayed in this study contribute to the literature on event portfolio via description of real-life case examples of how to develop competencies based on post-event analysis in a proactive manner.

Keywords Destination image, Madeira Island, Event portfolios, Visitors’ satisfaction

Paper type Research paper

Introduction
Mature destinations have become increasingly dependent on the promotion of cultural resources, in their various forms, for a number of reasons (Todd et al., 2017). The diversification of the current offer based on untapped cultural resources and alternative market niches, capable of providing complex and rewarding experiences (Silberberg, 1995; Terluin, 2003; Richards, 2017) is purportedly the main reason behind the current drive to develop interlinkages between tourism and culture (Wicks and Fesenmaier, 1995; Getz, 2005, 2008). Attracting new consumer segments in order to reduce the extent of the local industry dependence on a few dominant markets of origin constitutes another important reason. The development of cultural tourism is equally associated with positive impacts on the economic dynamics of the territory through the development of endogenous development policies and as a seasonality mitigation tool (Todd et al., 2017; Long and Perdue, 1990; Maruo, 2014a; Terluin, 2003). In this regard, the
attempts to promote the progressive opening up of remote areas based on material and immaterial resources (e.g. architectural details, old religious and mystique traditions, culinary traditions and popular festivities) are justified on the grounds of strengthening the territorial cohesion of mature tourism destinations (Andriotis, 2003, 2006; Sharpley, 2002).

In the Western European context, event tourism and festivals have become one of the most pervasive manifestations of cultural tourism, and a “popular applied tactic” (Antchak, 2017, p. 281) on a wide range of small-scale events, in order to attain several developmental goals, such as those ones mentioned above (Buning et al., 2016; Ziakas and Costa, 2011; Mehmetoğlu and Ellingsen, 2005; Richards, 1999).

The myriad initiatives rooted in the development of festivals and events are based on the assumption that the proliferation of such initiatives offers an undeniable commercial interest, as well as an opportunity to attract a substantial base of well-off, first-class and loyal customers capable of co-creating (and co-staging) memorable experiences (Richards, 2013; Tanford and Jung, 2017; Yoon et al., 2010; Akhoondnejad, 2016). While most festivals and events are purpose-built to attract specific market niches, in a number of instances such events seek to attract a large and undifferentiated audience of residents and “passing by” visitors. Nowadays, destinations tend to offer such a quantity of both generic and thematically diverse events throughout the year that they have no alternative but to look constantly for more efficient ways to manage the increasing number of events. The formal establishment of an event portfolio is considered to be the most promising way to administer in the most efficient manner a diverse collection of events (Ziakas and Costa, 2011; Ziakas, 2010, 2013). However, the destination management organization (DMO) officials are still reliant on a piecemeal approach to tackle the challenges confronted by them when managing a wide array of disparate events (Hjalager and Kwiatkowski, 2017; Ferdinand and Williams, 2013; Ziakas and Costa, 2011). Moreover, most studies reported in the relevant literature are based on single events, which limits the ability to generalize findings and to disseminate good practices, success stories and lessons learned to other events’ landscapes (Tanford and Jung, 2017; Ziakas, 2014).

Research on the topic of the portfolio of events has been relatively limited (Pereira et al., 2015; Antchak, 2017; Clark and Misener, 2015; Buning et al., 2016). Antchak (2017, p. 282) reports “little theory and lack of empirical studies” and Ziakas (2014, p. 183) mentions that the topic portfolio of events is still at an “embryonic stage of development”, in spite of the increasing number of experiences in planning and implementation portfolios worldwide. The lack of studies reporting “consistent and accurate estimation of the contribution” from each of the events in a portfolio is rather common (Ziakas and Costa, 2011, p. 163), and one of the reasons that explain the ineffective proactive festival management and lack of strategic thinking based on post-event analysis leading to recommendations for improvement (Clark and Misener, 2015; Hjalager and Kwiatkowski, 2017). For host communities betting on “events”, positive benefits are “expected as a matter of course” (Kelly and Fairley, 2018; Gursoy and Kendall, 2006; Shipway, 2007; Chalip, 2004). However, recent research suggests a number of failures in this regard (Chalip, 2014), owing to the “innate fragmentation” of the events sector (Ziakas, 2019a). As observed by Antchak (2017, p. 281) “it is not enough just to host discrete events in a hope to anchor market attention, attract crowds of international visitors and redevelop the place itself”.

Although a number of important lessons in terms of planning and management of event portfolio have become increasingly well-established in the literature, there is still a lack of empirical studies in event portfolios in peripheral areas, as a number of questions regarding a portfolio grounding logic, management and upgrade are still unanswered (Ziakas, 2014, 2019b; Antchak, 2017). The literature lacks examples of a comprehensive overview of the “entire festival landscape” (Hjalager and Kwiatkowski, 2017, p. 3). This is clearly an issue of growing importance in the current turbulent environment of fierce competition and competing strategies based on events’ initiatives (Mariani and Giorgio, 2017). Quite often, portfolios are developed in an ad hoc manner (Antchak, 2017), without a common grounding logic, and systematic and recurrent
efforts to update competencies based on monitoring attendees’ satisfaction. For these reasons, we provide in this paper a descriptive analysis of a real-life portfolio of three key events in Madeira, which has only rarely been done in the literature. As elsewhere, the portfolio analysed in this study has not been formally established, being instead the result of the piecemeal and additive approach of developing new events to cover the whole calendar year. Therefore, this paper contributes to the literature on the portfolio by focusing on small-scale events developed in an ad hoc manner for the purpose of tourism development. In order to highlight key aspects of the data, this study adopts a demand-centric approach. For that purpose, we carried out a post-analysis exam of data on tourists’ satisfaction in order to identify commonalities in terms of behavioural patterns amongst attendees, profiles and attitudes and how information and analysis of items that may inform the planning phase of the next round of events.

In terms of the structure of the paper, it must be mentioned that the following section summarizes a few relevant aspects regarding the research around events are presented. The recent evolution of the tourism sector in the Autonomous Region of Madeira and the methodological approach retained in this study is described in the third section. The fourth section describes the main results and the fifth section offers some preliminary conclusions and suggestions for future analysis.

**Literature review**

**Event portfolios**

Event tourism had become one of the key strategic areas of intervention in most destinations (Getz, 2005; Kelly and Fairley, 2018). Events are expected to make a substantial contribution to the regeneration of urban areas and to the territorial dynamics of underdeveloped territories (Getz and Page, 2016; Marini and Giorgio, 2017; Higgs-Dessiosles, 2018; Quinn, 2006; Antchak, 2017; Ziakas and Costa, 2011; Gotham, 2005; Harcup, 2000). In this regard, the attempts to promote the progressive opening up of remote areas based on material and immaterial resources (e.g. architectural details, old religious and mystique traditions, culinary traditions and popular festivities) are justified on the grounds of to strengthening the territorial cohesion of mature tourism destinations (Andriotis, 2003, 2006; Sharpley, 2002). DMOs also expect developments in terms of reduced levels of seasonality, place marketing, image formation and destination branding as well as in an increased stock of high-profile entertainment and leisure attractions (Xu et al., 2016).

With all these likely advantages in mind, the increased role of events and festivals in destinations’ tourism development strategies and policies, and the growing number of studies and reports in the field of tourism on the subject of event tourism is hardly surprising. However, many destinations have been affected adversely directly or indirectly by the “random and eclectic choice of events” in the recent past (Antchak, 2017, p. 282) transcribed in the establishment of a “kaleidoscope of sporting, cultural, and arts events” (Antchak and Pernecky, 2017, p. 545).

In order to attract additional segments of demand, well-established and popular local cultural events and decades-old habits, customs and traditions have been rebranded as mega-events or as events of special interest for tourists (Marujo, 2014b; Dwyer et al., 2000; Tomljenovic and Weber, 2004). In such cases, the critical input provided by marketers and cultural managers and alike lies in the introduction of innovative “unauthentic” creative elements and media coverage intended to create an emotional response towards such events. In other instances, marketers create postmodern events from scratch inspired by contemporary urban experiences or on enactments of historical events or mythological epics, either by staging authentic elements or by adding artificially reinterpreted elements from the locality’s past (Jago et al., 2003; Bankston and Henry, 2000; Che, 2008; Davis, 2017; Chhabra, 2005; Hughes, 1999).

Whatever the logic behind or intrinsic nature of festivals being currently staged, Getz (2010) refers that we are witnessing a general “festivalization” process as a result of the
over-commercialization of festivals and other cultural events in destinations too anxious to
diversify and differentiate the tourism offer and marketing mix (Quinn, 2006; Richards, 2007;
Falassi, 1987). In fact, a growing number of events have been created intentionally to develop
what Richards and Palmer (2010) call “eventful cities” (Getz and Page, 2016; Mariani and
Giorgio, 2017; Gabr, 2004). Nevertheless, succeeding in this field remains a major challenge.
Cities expecting to become competitive “eventful cities” (Richards and Palmer, 2010), must
evolve from a simple juxtaposition of unrelated and undifferentiated events in the calendar
towards the development of a portfolio of events managed professionally. For that purpose,
the grounding logic of the events’ portfolio must be in line with the city’s key strategies and
policies, and the DMOs officials must implement learning and monitoring processes.

Cities have been competing to attract and stage large-scale events of national and
international significance (Antchak, 2017). However, it is worthy of consideration that small-scale
events have similarly been recognized as an appropriate and fiscally sound way of developing
the event tourism industry (Gibson et al., 2012). Chalip and Costa (2005), O’Brien (2007), Gibson
et al. (2012) and Pereira et al. (2015) concluded that smaller events are equally capable of
contributing to the socio-economic development of the host community (Veltri et al., 2009).
Small-scale events have been thoroughly acknowledged as a significant way to develop
managerial and organizational competencies to host major events in the near future and to
reinforce the stock of the events (Ziakas, 2014; Taks, 2013; Taks et al., 2013, 2014; Higham, 1999;
Higham and Hinch, 2002; Wilson, 2006). In fact, mega-events can lead in the long term to
negative impacts, because it is harder to be competitive and effective in bidding processes
against wealthier regions (Pinson, 2016). Ziakas (2014, p. 2) observes that “one-off mega-events
are inherently limited because of their one-time temporal character”.

Whatever the strategy followed by the communities hosting events, such communities
confronted with a growing number of events to be managed began to adopt a strategic event
portfolio approach (Getz, 2005, 2008; Ziakas, 2013; Chalip and Costa, 2005). An event
portfolio was defined by Ziakas and Costa (2011, p. 409) as a “system that assembles
different event stakeholders in a network and serves multiple purposes”. A “coincidental
potpourri of miscellaneous events” (present in a number of instances) cannot be
appropriately defined as a strategically planned and managed portfolio of events with a
common theme and shared strategies and resources (Ziakas and Costa, 2011, p. 151).

It must be acknowledged that it is not easy to move from a single event mindset towards
a portfolio of events because, as observed by Benur and Bramwell (2015, p. 214), tourism
products are often the result of “uncoordinated individual market-based decisions rather
than coordinated destination-level policies and market interventions”. The strategic
management of a portfolio demands the identification of cross-leverages among the events
in the portfolio and a “mind shift” from single (events) analysis to a comprehensive analysis
of multiple events (Ziakas, 2013), which is even more difficult. According to Ziakas (2010),
success in planning and managing events demands multiple goals (economic, political, and
cultural) to be defined, cross-leverages between events and the current tourism strategy and
the identification and nurturing of synergies among different events (Andersson et al., 2017).
The development of synergies among events and economic, tourism, leisure, sports or
socio-cultural objectives is an additional requirement to be reckoned with (Ziakas, 2010;
Benur and Bramwell, 2015).

The portfolio approach is perceived as a key precondition for the successful management
of an assorted mix of events in order to ensure the development of synergies between
“seemingly disparate events” (Ziakas, 2014, p. 333; Ziakas and Costa, 2011; Gibson et al.,
2012). Getz (2010) “highlighted” the advantages of employing principles of strategic
development, in order to take advantage of market tendencies and changing behavioural
patterns to foster tourism and economic development, capacity building and private sector
development. The effective management of a portfolio of events demands hosting multiple
and different types of events in both the low and shoulder season (Getz, 2005; Pinson, 2016),
the development of synergies and (joint event strategies) among them (Chalip, 2004; Chalip
and Costa, 2005; Jago et al., 2003) and the adoption a multi-goal agenda (Ziakas, 2013, 2014)
to avoid an overemphasis on economic matters. The development of a common theme was
highlighted by Ziakas and Costa (2011) and Dickson et al. (2018) refers to the development of
organizational capacity and collaborative networking as another critical factor of success.
Getz and McConnell (2014) consider that the combination of events and destination’
attributes is of paramount importance.

By failing to adopt principles of strategic portfolio management, host communities have
found out that the benefits predicted in the pre-planning phase simply do not occur, owing
to faulty and ad hoc planning (Pereira et al., 2015, p. 27). The concept of event portfolio is
based on the idea that any event supports and potentiates both short (immediate) and long-
term benefits if event leveraging techniques are adopted (Ziakas, 2014; Green et al., 2003;
O’Brien, 2007; Chalip, 2000). Ziakas (2014) mentions that successful portfolios lead to
attaining multiple outcomes. Portfolios must be purposefully designed to achieve multiple
goals (economic, political, social and cultural), to foster complementarities and synergies,
learning capabilities and a sense of achievement (Benur and Bramwell, 2015).

However, the paucity of empirical studies on the subject of portfolio of events (Dragin-Jensen
et al., 2016; Etemad and Motaghi, 2018; Andersson et al., 2017) and on the role of events as a
leverageable resource (Pereira et al., 2015; Chalip and Costa, 2005) prevents further analysis on
the importance of an event portfolio as a strategic tool impacting the development of the
tourism industry. Ziakas (2010, p. 147) refers to the lack of illustrative and descriptive studies on
the “nature of an event portfolio and the ways that different events are interrelated”. Although a
number of studies were produced in recent times on the “subject of event-led leverage” economic
and social leverage, Pereira et al. (2015) and Smith (2014) report a dearth of research on
event-theme leveraging (Schulenkorf, 2010). Moreover, the effective development of synergies
and the definition of joint event strategies among them is also a relatively under-researched
Mariani and Giorgio (2017) and Giovanardi et al. (2014).

There is also a clear recognition of the many challenges associated with developing a
portfolio of events. The question remains as to how to develop the capability to effectively
develop synergies amongst events and long-term benefits. Ziakas (2010, p. 148) relates
cross-leveraging events to “understanding inter-relationships, fostering synergies, and
enhancing complementarities”.

The definition of cross-leverage strategies demands to analyse of the different events can
be “synergised” (Ziakas and Costa, 2011) to optimise the intended outcomes. Cross-leveraging
strategies may be conceptualized based on the exchange of resources, best practices and
common themes and marketing strategies and campaigns. Cross-leverage demands the
incorporation of events into the overall destination branding and management of the
destination (Chalip and Costa, 2005), and offer opportunities to different stakeholders to
“converge” and to “capitalizing on the strategic opportunities that portfolios offer to
cross-leverage events for multiple developmental purposes” (Ziakas and Costa, 2011, p. 154;
Seckelmann, 2002). The identification of tactics and strategies (O’Brien and Chalip, 2008;
O’Brien, 2007) to extend the length of stay and daily expenditure based on cross-leveraging
the main activities of each event with tourism attractions and subsidiary events constituter an
example of areas of interest in terms of cross-leverage.

A key issue in the topic of event portfolio regards relatedness is defined by “the ways that
events complement one another” (Ziakas, 2014, p. 329), in terms of resources, theming and
markets (Ziakas and Costa, 2011, p. 151). Ziakas (2010, 2013) consider that relatedness may be
operationised through a series of different processes, namely, transfer of knowledge among
events in the practicalities of organizing events in an efficient and effective manner,
identification, allocation and coordination of shared resources (e.g. pools of volunteers) among events, definition of a common theming uniting and “symbiotically connecting” the different events aiming at facilitating the exchange of good practices and the establishment of links with the destination main comparative advantages and the development of new markets in order to attract a new clientele in the low and shoulder season.

Relatedness offers the opportunity to think in a practical way about interdependencies and complementarities without running the risk of jeopardizing the current advantages through “hosting monotonously repetitive” akin to “exhausting the pool of local resources” (Ziakas, 2014, p. 333). To that end, it is necessary to identify operational and thematic relatedness and to plan strategically the addition of new events to the portfolio. Envisaging a further stage of implementing of cross-leveraging strategies is permissible as long as the events managers succeeded in devising practical manners to empirically pursue a relatedness-led agenda. Cross-leveraging strategies are intended to facilitate “the timely and synchronized implementation of activities and related tactics” (p. 346) with the ultimate goal of attaining multiple purposes.

Any attempt to create synergies and achieve success is clearly dependent “on considerable market intelligence” (Getz and McConnell, 2014, p. 76). In this study, based on the results of three intercept surveys, we seek to identify possible complementarities and potential synergies among events based on the empirical study aiming to identifying critical factors of success impacting satisfaction. Positive event experiences appear to lead to positive tourism destination experiences (Mariani and Giorgio, 2017, p. 91; Lee et al., 2012). Lee et al. (2012) demonstrated that higher levels of satisfaction reported by attendees lead to “moderate levels of emotional attachment to the festival” and in a later stage, to higher levels of loyalty. Because achieving success in terms of attendee’s satisfaction is critically important, Dickson et al. (2018) pledge for a more “professional and strategic approach to events” and Andersson et al. (2017) advocates “mechanisms for making and managing the event portfolio” in order to match visitors’ expectations (Mossberg and Getz, 2006; Nicholson and Pearce, 2000). In that sense, we think that the identification of the most important features of each event, as well as the examination of the critical factors of success, offers the opportunity to develop feedback mechanisms as learning methods feeding critical inputs in the decision-making process (Mariani and Giorgio, 2017).

Portfolios are not static (Andersson et al., 2017) and rapidly changing market conditions must be taken into consideration to offer products matching customers’ preferences and expectations; feedback mechanisms offer the opportunity to identify opportunities, maximize benefits and minimize costs/problems. By evaluating the current portfolio of events, critical success factors can be identified, and resources allocated more effectively. Mariani and Giorgio (2017) consider that is it necessary to place more emphasis on the DMOs efforts to efficiently develop a portfolio of events, rather than on “social practices and processes”. Moreover, the dramatic reduction in public financing and “public subsidies” for promotion (as observed by Andersson et al., 2017, “events need to demonstrate a financial return on investment”) had the merit of forcing the local authorities to find ways to manage in a coordinated, cost-effective, creative and synergistic way the pool of physical, human, cultural and financial resources allocated to stage events (Mariani, 2015; Mariani and Giorgio, 2017).

**Events attendee’s satisfaction**

Customer satisfaction is considered a critical measure of destination’s performance (Smith and Costello, 2009). Yoon and Uysal (2005, p. 47) consider satisfaction to be the most basic parameter in terms of assessing the performance of a destination in terms of the product and service mix. In this regard, the identification of the critical factors of success impacting customer satisfaction is a key managerial issue (Trindade et al., 2018; Schofield and Thompson, 2007), owing to the impact of satisfaction on daily expenditure, customer
loyalty and repeat attendance behaviour. With regard to issues of measurement of satisfaction, Costa et al. (2004) refer to two main conceptual approaches: attitude-oriented and satisfaction-oriented. A satisfaction-oriented assessment is based on “customers experience with a product” and/or service “while attitude-oriented assessments are formulated through a preconceived belief or conviction” (Smith and Costello, 2009, p. 99). While most authors employed a measure of customer satisfaction based on the expectation-disconfirmation paradigm developed by Oliver’s (1980), Crompton and Love (1995) shown that “performance was the best predictor of satisfaction”.

In fact, expectations play a minor role in cultural events, especially if participants attend the event by chance or have no prior knowledge (Cuadrado-García et al., 2017; Trindade et al., 2018). As observed by Cuadrado-García et al. (2017, p. 160), attendants participating in a cultural-related event for the first time may lack “clear expectations about it”, and as a result, satisfaction is “developed after the visitor’s experience with the event”. Furthermore, performance-based measures are easier to collect, which similarly favours a satisfaction-oriented approach. Still on the topic of satisfaction, Cuadrado-García et al. (2017) consider that “satisfaction” in connection with cultural and arts-related events is mostly derived from a combination of three aspects categorized as “the subjective and experiential aspects of the cultural product”, plus “the quality of the venue”, and finally, the “quality of the associated peripheral services”. In the same vein, Trindade et al. (2018) developed a satisfaction-scoring index based on factorial analysis of a number of core and peripheral characteristics of a music festival event. Cuadrado-García et al. (2017) measure satisfaction based on the analysis of both the core product centred around the artistic performance, and the augmented product defined as the “attributes connected with the artistic event”, including several physical amenities such as parking facilities and bathroom facilities. In line with Tanford and Jung (2017) and Cuadrado-García et al. (2017), we measure satisfaction as a global assessment of experience, asking respondents a single overall assessment of their degree of satisfaction, “omitting the role of expectations”. Therefore, satisfaction refers to the attendee’s overall satisfaction with the festival and is considered to be the result of the attendants’ evaluation of specific attributes.

However, we also analysed attendants’ perceptions on a series of festival characteristics, such as organization, beauty, creativity, to differentiate the impact of the core exhibition from its peripheral elements.

Getz and Page (2016, p. 597) refer that event tourism is a “form of special-interest travel”, determined by tourist’s specific interests. Accordingly, in this study, we differentiate participants travelling to attend the event from those ones attending by chance. Implicitly, the DMO expects a large number of tourists to attend by chance, as a result of having travelled to the region at the precise moment. As observed by Oppermann and Chon (1997) and Getz (2008), attendees participate for different reasons and experience and interpret the event in a differentiated manner, in line with their motivations to travel, degree of past participation and particular “wants and needs”. Events have the capacity to “instantiate meanings” to tourists and to intensify the overall tourist experience (Ziakas and Boukas, 2013, p. 94). The key issue essential to understand tourist’ attitudes is less the “nature of lived experiences” while attending the event but rather the “meanings attached to them” (Getz, 2008).

According to Ziakas and Boukas (2013, p. 95), meanings “include all experiences, feelings and thoughts as well as the subsequent sense of salience that people obtain from their participation in, or attendance at, event-based activities”. Meaning although conditioned by a high degree of subjective significance, influences the overall degree of satisfaction with the event, and consequently, future tourism behaviour. For that reason, past research focussed on examining how meaning was formed following tourists’ interaction with the event experience. Past research showed that the characteristics and intensity of the experience impacted the overall significance attached to the event and the degree of satisfaction (Getz, 2008; Ziakas and Boukas, 2013). This study does not focus on understanding in a detailed way what makes the
experience meaningful. However, we strongly believe that further analysis informed by the results of this study must focus on a qualitative approach intended to grasp the motivations, meaning and the needs, aspirations and difficulties faced by attendees.

Madeira presents an excellent opportunity to examine the main propositions described in this section. The local tourism office has been pursuing an active events policy, with a number of high profile and smaller events being established in recent decades. The increasing concern about growing competitive pressures from other well-established destinations and issues of accountability and declining external financing prompted the local government to put in place a quality/satisfaction monitoring system. What this paper does, therefore, is to study the main factors impacting satisfaction in each of the events under study to detect common traits and critical key issues with the potential to be managed conjointly.

Methodology

Contextual setting

Before moving on, it is useful to consider a few notes on the recent evolution of the tourism sector within RAM. Funchal, the capital city of the Autonomous Region of Madeira (RAM), was chosen as the field study location because event tourism is growing in importance as the local DMO attempts to diversify the current tourism offer and lessen its reliance on nature. The tourist industry of RAM is the key local economic sector, contributing decisively in terms of GDP and employment, if we take into account all the direct and indirect impacts 21 per cent of GDP and 15 per cent of employment (Ismeri Europa, 2011).

In terms of the current stage development, by taking into account the evolutionary history development of the neighbouring destinations, namely the Canary Islands (mass tourism) and of the Azores (development of market niches), there are reasons to rank RAM as in an intermediate stage of development. The region attracted 1,365m tourists in 2016, providing 7,368m overnight stays. The hotel offers comprised 156 hotels by the end of 2016, corresponding to an accommodation capacity of 29,118 beds. Data on occupancy and the average length of stay point to above-average figures in national terms (69.2 per cent and 5.4 days), which suggests a relatively positive outlook in the national context.

In order to understand the reasons behind the region’s current emphasis on event tourism and the recent dynamics of the sector, it matters to examine two key variables: RevPAR and arrivals growth rate. The trend recorded in terms of RevPAR broadly suggests a positive trend for the 1976–2000 period, followed by substantial losses in the years 2000–2010, with signs of recovery since 2014. The figures for 2010 are 32.5 per cent lower than the values recorded in 2000. That is, the successful consolidation of an image of top-quality hotels (the region excels in the number of four and five-star hotels) did not match the sector’s ability to charge higher prices in line with the quality of the service provided. The erratic pattern of demand in the period after 2000, in sharp contrast with the impressive record of the preceding years, raised further concerns about the sector’s prospects.

The data on arrivals suggest a relatively consistent upward trend, with breaks limited to a few years, for the period 1976–2000. The average annual growth rate is around 4.18 per cent with respect to the period 1976–2016. However, the pace of growth has slowed since 1990, with a loss of 0.05 percentage points per year. An analysis of the data on the period 1976–2010 placed the sector in a stagnation stage, with the obvious risk of decline if measures were not taken. The outlook seems more positive if we consider the recovery that began in 2012. However, any decision-maker in office in the years 2008–2012 could not afford to ignore the strong signs of decline. Not surprisingly, the local authorities reacted by adopting a development strategy based on the multiplication of events, experiences and promotional offers. One of the areas that deserved attention at that particular moment was culture and heritage, given its relatively incipient level of development at the time.
The image of the destination conveyed abroad was characterized by a high degree of emphasis on a few main themes. Broadly, a set of motivations based on the nexus nature-relaxation prevailed, with a limited but increasing number of respondents mentioning additional reasons to visit the island such as gastronomy, cultural events and contact with the local culture. Factors such as climate/weather, nature/landscape, travel with family and friends, coupled with the opportunity to discover a relatively exotic environment, located within a reasonable distance from the European mainland emitting markets emerged as the key determinants in the decision-making process.

Currently, Madeira offers a wide range of events comprising both major events aiming at larger audiences, and smaller events scheduled to attract a specialist market. A number of such events are deeply rooted in the local traditions and identity. Based on the typology developed by Getz and Page (2016), it can be stated that Madeira offers mainly festivals and culture-related events, based on festivals, parades and commemorations. The local DMO succeeded in placing entertainment events through the year calendar. Every year Funchal hosts three major events and a number of small events, including sportive events, managed either by the Tourism Office or by the local City Hall. The event-based strategy in place seeks to change the island’s image which is still heavily reliant on nature. The information available in official documents and regional press suggests that planners are “overly” focussed on “delivering economic results” (Pereira et al., 2015, p. 293; ACIF, 2015; Marujo, 2014a, b, c) via tourism development because a year-round programme of events covers both the off-season/shoulder season and the peak of the summer.

The events analysed in this study are presented in Table I. The analysis provided in Table I has been made on the basis of the information provided by the DRT (on the website) (Marujo, 2014a; ACIF, 2015). Both the Carnival and Flower Festival have the hallmark status and are significant contributors to the city’s reputation (Marujo, 2014b, c). The local Tourism Office (DRT) began to increase the number of events in a rather planned and additive way, but one cannot affirm that the city manages a portfolio of events. However, the region gained valuable experience in managing events and festivals.

The Strategic Planning Document of 2002 already expressed the intention to upgrade the supply of tourism products and value for money of the current offer based on events, festivals, recreation and leisure areas, culture and ethnography. The development of events followed a multi-purpose logic. For example, the Atlantic Festival was conceived in order to celebrate the Atlantic specificity of Madeira, by highlighting the exuberance of the island’s nature, the richness of its heritage and the contribution of the Region to the history and culture of Europe. The festival also aimed at affirming the regional identity from the very outset. At the political level, enhancing the ability to gain footholds in the management of an autonomous tourism development policy (vis-à-vis Lisbon) was regarded as an important issue. Both the Carnival and Flower Festival, in their current formats, aim mostly at attracting every year a pool of loyal repeat visitors along with new ones (Marujo, 2014a, b, c).

The events under analysis represent the core of the portfolio of events currently managed by the Tourism Office. The first two events correspond to well-established festivals widely covered in the news, benefitting from a high percentage of loyal followers and enthusiasts. The Atlantic Festival has been staged since 2002 as a result of sustained efforts to attract a more diverse clientele in the peak of the Summer. The Carnival has international standing and has been packaged as a week-long festival. The Flower Festival consists of floral displays, music and a colourful parade through the streets of the capital of Madeira with floats decorated with natural flowers and fairy tale costumes.

Further details are provided in Table I.

Mariani and Giorgio (2017) mention that governments are increasingly involved in planning and managing events (Dredge and Whitford, 2011; Dredge and Jamal, 2015;
Carnival

One of the region’s liveliest events, deeply rooted in the traditions of the island, with parades and a variety of activities to be enjoyed either as a spectator or as an active participant. The Madeira Tourism website advertises a “constant festive atmosphere”, with both a number of official initiatives and spontaneous activities "with joy and cheerfulness prevailing in the streets, establishments and private homes”.

February or March. As of 2019, activities took place between 19th February and 1st March. The main activity comprises a float parade attracting thousands of visitors to the Centre of Funchal taking place on a Saturday. Event organized by DRT.

International tourists in general and repeat visits in particular. The event attracts thousands of loyal attendees mainly from the mainland. Locals from around the island attend the event and residents from traditional city districts and samba schools take part in most activities.

Hallmark event, with national-wide coverage in the media; Sub-genre: festival and culture; Origins in traditional celebrations. At a more local level, Carnival celebrations include the so-called "Comprades Feast", which is characterized by social and political satire comprising a "part of passage from winter to spring ritual and the renewal of the local community". Carnival traditions also involve parties taking place in private homes to celebrate friendship and the insular identity through seasoned delicacies. In recent times, themed parties such as the Hippies Night and the Travesties Night.

Occupancy rate in the Hotel establishments in 2019: 73%. Based on the results from this study we estimate the number of visitors travelling to attend as around 9830.

Flower Festival

The Flower festival intends to celebrate the "specific climatic conditions that allow species of flowers from both tropical and cold regions to flourish". The Flower Festival is advertised as "a tribute to spring, and the celebration of metamorphosis and rebirth, fertility and the abundance of the flowers that colour,”

March or April. As of 2018, activities took place from 2nd of May to 20th of May, in a month long festival. The main activity comprises a float parade taking place in the Centre of Funchal.

International tourists in general. Repeat visits and a sizeable number of loyal participants. Locals from around the islands participate.

Hallmark event: Sub-genre: festival and culture. The Flower Festival is a pure artificial event aiming at the tourism market established since 1979, but increasingly important from a local point of view.

Occupancy rate in the Hotel establishments in 2018: 90%. Estimated number of visitors travelling to attend the event

Table I.
Main features of the events under analysis

<table>
<thead>
<tr>
<th>Event</th>
<th>General description</th>
<th>Venue, dates and organization</th>
<th>Market orientation</th>
<th>Type of event</th>
<th>Scope and attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnival</td>
<td>One of the region’s liveliest events, deeply rooted in the traditions of the island, with parades and a variety of activities to be enjoyed either as a spectator or as an active participant. The Madeira Tourism website advertises a “constant festive atmosphere”, with both a number of official initiatives and spontaneous activities &quot;with joy and cheerfulness prevailing in the streets, establishments and private homes”</td>
<td>February or March. As of 2019, activities took place between 19th February and 1st March. The main activity comprises a float parade attracting thousands of visitors to the Centre of Funchal taking place on a Saturday. Event organized by DRT</td>
<td>International tourists in general and repeat visits in particular. The event attracts thousands of loyal attendees mainly from the mainland. Locals from around the island attend the event and residents from traditional city districts and samba schools take part in most activities</td>
<td>Hallmark event, with national-wide coverage in the media; Sub-genre: festival and culture; Origins in traditional celebrations. At a more local level, Carnival celebrations include the so-called &quot;Comprades Feast&quot;, which is characterized by social and political satire comprising a &quot;part of passage from winter to spring ritual and the renewal of the local community&quot;. Carnival traditions also involve parties taking place in private homes to celebrate friendship and the insular identity through seasoned delicacies. In recent times, themed parties such as the Hippies Night and the Travesties Night</td>
<td>Occupancy rate in the Hotel establishments in 2019: 73%. Based on the results from this study we estimate the number of visitors travelling to attend as around 9830</td>
</tr>
<tr>
<td>Flower Festival</td>
<td>The Flower festival intends to celebrate the &quot;specific climatic conditions that allow species of flowers from both tropical and cold regions to flourish&quot;. The Flower Festival is advertised as &quot;a tribute to spring, and the celebration of metamorphosis and rebirth, fertility and the abundance of the flowers that colour,”</td>
<td>March or April. As of 2018, activities took place from 2nd of May to 20th of May, in a month long festival. The main activity comprises a float parade taking place in the Centre of Funchal</td>
<td>International tourists in general. Repeat visits and a sizeable number of loyal participants. Locals from around the islands participate</td>
<td>Hallmark event: Sub-genre: festival and culture. The Flower Festival is a pure artificial event aiming at the tourism market established since 1979, but increasingly important from a local point of view</td>
<td>Occupancy rate in the Hotel establishments in 2018: 90%. Estimated number of visitors travelling to attend the event</td>
</tr>
</tbody>
</table>

(continued)
The Atlantic Festival is a recent tourist entertainment initiative aiming at bringing together pyro musical shows, a Regional Arts Week, a music festival and Popular Saints Festivities. A month long festival centred in June, focusing on international tourists in general and local residents. The type of event is sub-genre entertainment. Scope and attendance include occupancy rate in the Hotel establishments in 2018: 90%. Estimated number of visitors travelling with the main purpose of attending the festival.
In fact, the planning, organization and funding of events remain some of the few areas of the direct intervention of DMOs in terms of product development, which is presently the case of the Tourism Office in Madeira.

Methodological approach
In the early years of festival studies, the analysis of event tourist experiences from the perspective of identity, cultural and political meanings predominated (Getz, 2008; Mariani and Giorgio, 2017; Richards, 2007, 2013). However, a substantial number of recent studies and analyses adopted a quantitative stance characterized by an instrumentalist view of the role of festivals at the expenses of developing further theoretical analysis based on well-established sociological and anthropological theories. In this study, we adopt a quantitative demand-centred analysis. The database used in this study derives from a fieldwork commissioned by Madeira Regional Directorate for Tourism (DRT) aimed essentially at ascertaining the degree of satisfaction of attendees with a series of events organized by the DRT, which fits with the most instrumentalist view of the role of festivals. Respondents were invited to answer a series of questions regarding their socio-demographic background, travel motivations, travel experience, quality appraisal, satisfaction and loyalty. The questionnaire consisted of three parts.

The first part collected data on the key demographic characteristics of the attendees. The second part comprised questions pertaining to attendees’ motivation to travel to the region at that precise moment, travel arrangements, party size and daily expenditure. The third part asked respondents to rate the significance of the items on quality, satisfaction, intention to return and willingness to recommend on a seven-point Likert scale (1 completely disagree, 7 completely agree). Fieldwork was conducted from February 2017 to June 2017 and comprised various surveys. A self-administered questionnaire was used to collect empirical data for this research.

In total, we carried out three data collection processes, one for each event. Events (and the corresponding data collection processes) took place in February (Carnival), May (Flower Festival) and June (Atlantic). For events spanning through an entire month, we distributed questionnaires, at different moments in time. In order to approach the maximum number of visitors, in the days following the main events, we opted for a quantitative survey. We adopted a double approach regarding the data collection procedures with active support and participation of a network of hotels, plus the distribution of questionnaires in the check-in areas of the local airport.

Hotels owners were contacted by the DRT to solicit their participation in the survey. In total, 40 hotels accepted to participate. The sample of hotels that accept to participate included a number of 3, 4 and 5 stars hotels, randomly selected from a database provided by the DRT, in line with their representativeness in terms of the total number of hotels in the islands. A sufficient number of questionnaires were left in each hotel, and the questionnaires filled out by visitors were collected in a one-week time. Questionnaires were also made available to visitors departing the destination at the island airport. In this case, visitors were approached as randomly as possible. It was considered in line with Barajas et al. (2016) and Tanford et al. (2012) that a mixed sampling convenience plus random selection method was, pragmatically, the best approach to gather as many questionnaires as possible in a short period of time, taking into account, furthermore, that the events took place in open spaces.

The objectives of this study were to determine the profiles of the festival-attendees based on socio-demographic data, to identify commonalities in terms of the demographic factors and intended behaviour, and to obtain data on attendees’ assessment of their degree of satisfaction and daily expenditure. Based on the review of the literature and in-depth analysis of measures used in prior studies, we identified several pertinent attributes of the “festival experience” (motivation and quality) and the key themes of attendants’ behaviour most examined in the literature (satisfaction, intention to return and daily expenditure).
(Axelsen, 2007; Backman et al., 1995). Quality in this study reflects to attendants’ perceptions on a series of festival characteristics, such as organization, beauty, creativity and their impact on satisfaction. Loyalty reflects attendants’ intentions to return to the festival next year as well as the willingness to recommend it to others. The relationship between festival attendance and satisfaction is one of the items measured in festival studies (Shanka and Taylor, 2004). From this point of view, we follow standard procedures in the field of tourism events.

Although the questionnaire lacks a relatively complex theoretical and conceptual framework to analyse satisfaction, we follow Tanford and Jung (2017), Trindade et al. (2018), Cuadrado-García et al. (2017) and Yoon et al. (2010). Such studies adapted, with varying degrees, established methodological approaches, but included a numbers of characteristics such the use of a single overall assessment of satisfaction measured in the aftermath of the event and the writing-up of the final draft of the questionnaire in collaboration with other entities (Cuadrado-García et al., 2017; Trindade et al., 2018; Tanford and Jung, 2017). The methodological approach retained in this study to define the layout of the questionnaire transcribed in limited number of questions “in order to keep the questionnaire on a single two-sided sheet” (Tanford et al., 2012, p. 85), enabled the research team to significantly increase the number of questionnaires collect from different sources (hotels and airport venue), thus circumventing the technical constraints (i.e. impracticability of conducting surveys conducted in open spaces during the performance or shows) imposed by the very nature of the events taking place in open areas. The results of this study provide significant encouragement to engage further in research on the topic of event portfolio from different perspectives (e.g. based on complex constructs and/or qualitative methodologies) with support from the DRT.

In order to get basic answers on the variables and constructs identified above and better understand the commonalities shared by the three festivals under analysis, the current research tested a model analysing the effects of festival quality, socio-demographic factors and motivation on satisfaction. Furthermore, the research examined the relationships among the predictors, and the differences in terms of socio-demographic data.

In total, the sample comprises 1,823 respondents, which makes it possible to characterize different demand segments (festival as a key motivation vs other motivation to visit the island, first visits vs repeaters and previous experience with the festival under analysis vs the first-hand experience) with a great degree of accuracy.

Data analysis followed a three-stage process. The first phase is based on the calculation of simple descriptive statistics to characterize the key features of the sampled respondents. The second phase involves the analysis of distinct segments, and the third phase employed econometric models aiming at the identification of key drivers of satisfaction. It should be mentioned that 33 per cent of the sample refers to the Carnival, 35.3 per cent to the Flower Festival and 31.7 per cent to the Atlantic Festival.

Results
The average age of the respondents is 56.8 years, with the segment of 65-year-olds or more corresponding to 35 per cent of the respondents. The sample appears balanced in terms of gender, with 50.8 per cent male and 49.2 per cent female, with 73.5 per cent of respondents declaring themselves married/non-marital partnership. In terms of country of origin, 27 per cent of respondents declared residence in the UK, 23 per cent in Germany, while respondents residing in Portugal and France account for about 13 per cent of the sample each, which corresponds roughly to the profile provided by the official statistics in terms of markets of origin. The average reported income is €3,576. Approximately 38.8 per cent of the respondents reported as having an academic degree, with 14.4 per cent of respondents reporting a master or PhD diploma. Additional data are depicted in Table II. Given that we
are dealing with events subject to a differentiated historical evolution, located at different moments in time, we also provide individual statistics on each event.

Although statistically significant differences can be detected amongst the different data sets in relation to key socio-demographic variables (see Table III), there are no significant “differences” in terms of order of magnitude in relation to socio-economic data in general.

<table>
<thead>
<tr>
<th>Variable</th>
<th>Carnival</th>
<th>Flower Festival</th>
<th>Atlantic Festival</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>56.0 years</td>
<td>59.3 years</td>
<td>54.9 years</td>
</tr>
<tr>
<td>Income</td>
<td>€4,025.4</td>
<td>€3,290.8</td>
<td>€3,394.6</td>
</tr>
<tr>
<td>First visit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carnival</td>
<td>52%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flower Festival</td>
<td>58%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Atlantic Festival</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average daily expense</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carnival</td>
<td>€143.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flower Festival</td>
<td>€155.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Atlantic Festival</td>
<td>€142.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous event assistance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carnival</td>
<td>17%</td>
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</tr>
<tr>
<td>Flower Festival</td>
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<td>Atlantic Festival</td>
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<td>Motivation-travel purpose</td>
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<tr>
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<td>Flower Festival</td>
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<tr>
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<tr>
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<tr>
<td>Masters/PhD</td>
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<tr>
<td>Flower party</td>
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<tr>
<td>NSNA</td>
<td>6%</td>
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<tr>
<td>Basic</td>
<td>11%</td>
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<tr>
<td>Atlantic Festival</td>
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<tr>
<td>NSNA</td>
<td>6%</td>
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<tr>
<td>Basic</td>
<td>7%</td>
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<tr>
<td>Bachelor’s degree</td>
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<tr>
<td>Masters/PhD</td>
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Table II. Key statistics: Carnival, Flower Festival and Atlantic festival.
### Visitor’s satisfaction

<table>
<thead>
<tr>
<th></th>
<th>Carnival</th>
<th>Flower Festival</th>
<th>Atlantic Festival</th>
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<tbody>
<tr>
<td><strong>t-Test</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Satisfaction vs</td>
<td>$t = -2.864; \text{Sig.} = 0.005$</td>
<td>$t = -4.123; \text{Sig.} = 0.000$</td>
<td>$t = -3.878; \text{Sig.} = 0.001$</td>
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<td>main motivation$^{a}$</td>
<td>Averages: $6.09$ vs $5.64$</td>
<td>Averages: $6.41$ vs $6.06$</td>
<td>Averages: $6.41$ vs $5.72$</td>
</tr>
<tr>
<td>Satisfaction vs</td>
<td>$t = -1.614; \text{Sig.} = 0.107$</td>
<td>$t = -2.118; \text{Sig.} = 0.036$</td>
<td>$t = -1.243; \text{Sig.} = 0.215$</td>
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<tr>
<td>prior knowledge$^{a}$</td>
<td>Averages: $5.78$ vs $5.59$</td>
<td>Averages: $6.28$ vs $6.03$</td>
<td>Averages: $5.82$ vs $5.70$</td>
</tr>
<tr>
<td>prior assistance$^{b}$</td>
<td>$t = 1.405; \text{Sig.} = 0.161$</td>
<td>$t = -1.315; \text{Sig.} = 0.181$</td>
<td>$t = 0.642; \text{Sig.} = 0.222$</td>
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<td>Information Other$^{a}$</td>
<td>Averages: $5.59$ vs $5.76$ (n)</td>
<td>Averages: $6.29$ (s) vs $6.18$ (n)</td>
<td>Averages: $5.69$ (s) vs $5.71$ (n)</td>
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<td>Information Source</td>
<td>Mann–Whitney test: sig. = 0.25</td>
<td>Mann–Whitney test: sig. = 0.219</td>
<td>Mann–Whitney test: sig. = 0.364</td>
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<td>Family and friends$^{a}$</td>
<td>$t = -1.634; \text{Sig.} = 0.103$</td>
<td>$t = -1.511; \text{Sig.} = 0.132$</td>
<td>$t = -0.995; \text{Sig.} = 0.324$</td>
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<td>Satisfaction vs</td>
<td>Sim (6.78); Não (5.59)</td>
<td>Sim (6.32); Não (6.17)</td>
<td>Sim (5.84); Não (5.74)</td>
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<tr>
<td>prior knowledge$^{a}$</td>
<td>$t = -1.393; \text{Sig.} = 0.195$</td>
<td>$t = -1.954; \text{Sig.} = 0.035$</td>
<td>$t = -1.73; \text{Sig.} = 0.170$</td>
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<tr>
<td>Information Source</td>
<td>Sim (5.86); Não (5.67)</td>
<td>Sim (6.32); Não (6.17)</td>
<td>Sim (5.82); Não (5.68)</td>
</tr>
<tr>
<td>Source of</td>
<td></td>
<td></td>
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<tr>
<td>Information Other$^{a}$</td>
<td>$t = -2.675; \text{Sig.} = 0.027$</td>
<td>$t = -0.281; \text{Sig.} = 0.780$</td>
<td>$t = -0.739; \text{Sig.} = 0.429$</td>
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<td>Satisfaction vs</td>
<td>Sim (6.09); Não (6.57)</td>
<td>Sim (6.20); Não (6.21)</td>
<td>Sim (5.92); Não (5.74)</td>
</tr>
<tr>
<td>income$^{c}$</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>academic qualifications$^{c}$</td>
<td>NSNR: $6.0$</td>
<td>NSNR: $6.2$</td>
<td>NSNR: $6.1$</td>
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<td>Basic: $6.5$</td>
<td>Basic: $6.5$</td>
<td>Basic: $5.7$</td>
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<td>Secondary</td>
<td>Secondary: $6.2$</td>
<td>Secondary: $5.8$</td>
<td>Secondary: $5.8$</td>
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<td>Bachelor’s degree: $5.8$</td>
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<td>Bachelor’s degree: $6.2$</td>
<td>Bachelor’s degree: $6.2$</td>
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<tr>
<td>Masters/PhD: $5.5$</td>
<td>Masters/PhD: $6.0$</td>
<td>Masters/PhD: $6.0$</td>
<td>Masters/PhD: $6.0$</td>
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<tr>
<td>Satisfaction vs</td>
<td>$t = -0.070; \text{Sig.} = 0.945$</td>
<td>$t = -2.281; \text{Sig.} = 0.023$</td>
<td>$t = 0.593; \text{Sig.} = 0.553$</td>
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<td>first visit$^{a}$</td>
<td>Averages: $5.71$ vs $5.70$</td>
<td>Averages: $6.13$ vs $6.32$</td>
<td>Averages: $5.73$ vs $5.79$</td>
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<tr>
<td>Satisfaction vs</td>
<td>Z = 1.567; Sig. = 0.182</td>
<td>Z = 2.2337; Sig. = 0.054</td>
<td>Z = 3.800; Sig. = 0.050</td>
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<td>country of origin$^{c}$</td>
<td>Averages: $5.71$ vs $5.70$</td>
<td>Averages: $6.13$ vs $6.32$</td>
<td>Averages: $5.73$ vs $5.79$</td>
</tr>
<tr>
<td>Al/Fr/Pt/UK/Op</td>
<td>$t = -2.128; \text{Sig.} = 0.034$</td>
<td>$t = -0.259; \text{Sig.} = 0.795$</td>
<td>$t = -0.189; \text{Sig.} = 0.896$</td>
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<tr>
<td>Daily expense vs</td>
<td>$t = -2.142; \text{Sig.} = 0.033$</td>
<td>$t = -0.079; \text{Sig.} = 0.498$</td>
<td>$t = -1.082; \text{Sig.} = 0.280$</td>
</tr>
<tr>
<td>motivation$^{a}$</td>
<td>Averages: $2.808$ vs $2.787$</td>
<td>Averages: $2.936$ vs $2.787$</td>
<td>Averages: $2.600$ vs $2.811$</td>
</tr>
<tr>
<td>Daily expense vs</td>
<td>$t = -2.142; \text{Sig.} = 0.033$</td>
<td>$t = -0.079; \text{Sig.} = 0.498$</td>
<td>$t = -1.082; \text{Sig.} = 0.280$</td>
</tr>
<tr>
<td>Satisfaction$^{67a}$</td>
<td>Averages: $2.807$ vs $2.471.7$</td>
<td>Averages: $2.936$ vs $2.786.5$</td>
<td>Averages: $2.810.7$ vs $2.600$</td>
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<td>recommendation</td>
<td>Mann–Whitney test; sig. = 0.097</td>
<td>Mann–Whitney test; sig. = 0.115</td>
<td>Mann–Whitney test; sig. = 0.336</td>
</tr>
<tr>
<td>vs</td>
<td>$\chi = 143.172; \text{Sig.} = 0.000$</td>
<td>$\chi = 90.369; \text{Sig.} = 0.000$</td>
<td>$\chi = 108.180; \text{Sig.} = 0.000$</td>
</tr>
</tbody>
</table>

| **Notes:**  $^{a}$-Test average;  $^{b}$ANOVA  $^{c}$ANOVA |          |                |                   |

*Table III. Results of the comparison of averages*
For example, the average age of attendees is 56.0 years for the Carnival, 59.3 years for the Flower Festival and 54.9 years in the Atlantic Festival. In all, the profiles of the three samples are quite similar in terms of gender. About 52 per cent of the respondents in the Carnival event are reportedly on their first visit to the region. The figures for the Flower Festival and the Atlantic Festival are relatively similar (58 and 64 per cent). However, the conclusions drawn from the data are qualitatively different with regard to other variables. For example, about 40 per cent of the respondents travelling to the Flower Festival report the event as the main reason behind the visit. In contrast, only 12 per cent report the Atlantic Festival as the main driver of the visit.

Overall, about 30 per cent report having had attended in years prior to the event under consideration, with 60 per cent reporting having had prior knowledge of the event, but the differences amongst Festivals are substantial, as can be seen in Table II. In terms of average length of stay, the computed values point to an average of nine days, without any significant differences. Likewise, no major differences were found in terms of average total expenditure, with $Z = 1.801$, sig. = 0.166).

Table III reports the results of a series of $t$-tests applied to sub-samples under analysis. The results reported allow us to draw a number of additional conclusions. For example, respondents travelling on purpose to attend the event report higher levels of satisfaction (Carnival: 6.09/5.64; Flower Festival: 6.41/6.06; Atlantic Festival: 6.41/5.72), no matter which festival is considered. It also appears that the highly satisfied respondents (reporting levels of 6 or 7 on a Likert scale) in terms of satisfaction tend to exhibit a higher average of daily expenditure levels ($2,808/2,787; 2,936/2,787; 2,811/2,600). And it can be observed that respondents declaring prior knowledge of the event tend to report higher scores in terms of satisfaction (5.78/5.59; 6.32/6.17; 5.84/5.74). Likewise, the reported degree of satisfaction differs according to nationality, with respondents of German nationality exhibiting a less positive attitude in general.

Table III also shows that there were no significant differences between the first visits and repeat visitors regarding the degree of satisfaction in the case of Carnival and the Festival of the Atlantic Festival. There are also no significant differences (in terms of degree of satisfaction) in terms of the academic background, and in terms of income levels (e.g. with regard to the Carnival, the values of satisfaction regarding the levels of income NSNR, ≤500, €501–€1,000, €1,001–€1,500, €1,501–€2,500, €2,501–€3,500, €3,501–€5,000, €5,001–€7,500, €7,500–+ are 5.5, 5.8, 5.7, 5.8, 5.7, 5.7, 5.8, 5.9 and 5.6). There are, however, significant differences in terms of nationality, although minimal in absolute terms. For example, in relation to the Carnival, the nationality satisfaction indexes are as follows: 5.50 (German), 5.94 (French), 5.68 (Portuguese), 5.79 (British) and 5.75 (other nationalities).

Given the relevance of the satisfaction variable for the DMO, we sought to identify the critical factors determining the degree of satisfaction reported. Owing to the high number of ordinal and nominal variables, we opted for categorical analysis, using the SPSS CATREG functionality. The categorical regression (CATREG, according to the terminology of the SPSS statistical software) consists of an extension of the OLS method based on the simultaneous scaling of nominal, ordinal and numerical variables, treating quantified variables similarly to numerical variables. The CATREG method quantifies categorical variables by assigning numerical values to each of them, resulting in a linear optimal regression equation for the transformed variables. The CATREG method provides information on the degree of importance of each variable in isolation, based on Pratt’s indicator.

An initial set of relevant variables, including both socio-demographic and quality-related variables, was considered under the CATREG procedure. A successive process of elimination of non-significant variables (Pratt measurement of less than 0.05) allows us to identify a smaller set of relevant variables. The results clearly indicate that festival attributes (beauty, creativity, organization, opening hours and advertising) decisively influence the reported levels of satisfaction. Only a few other variables were identified as relevant in this regard.
In order to corroborate the above results we also employed a stepwise logit model, with the variable satisfaction defined as dichotomous (with value 1 recorded if the respondent indicated the levels 6 or 7 in terms of satisfaction and 0 otherwise), in order to determine the “best” predictors of satisfaction (see Table V). The results point in a similar direction. Being highly pleased or not depends to a large extent on respondents’ assessment of main technical characteristics of the event (quality assessment), that is, beauty, creativity, organization and time.

The impact of the socio-economic variables and travel arrangements is rather irrelevant, with the exception of age, which impacts satisfaction in the Carnival and Flower Festival (see Table IV). In both festivals, older respondents exhibit higher levels of satisfaction. Travelling to Funchal for the very first time (in the case of the Atlantic Festival), to stay longer (in the case of the Atlantic Festival) and higher levels of income also impact favourably affect the degree of satisfaction (in the case of Carnival). Being a German negatively impacts the degree of satisfaction in the case of the Carnival and Atlantic Festival. Previous experience with the festival (Carnival) and getting information from travel agencies (in the case of Carnival) or outdoors (Flower Festival) also negatively impact satisfaction (Table V).

Discussion and conclusion

Discussion

The results provided so far suggest a number of conclusions. A number of similarities (as well as differences) were detected, which is tantamount to recognizing the existence of common issues and continuities, namely in terms of critical factors of success. The events exhibit noticeable (significant) differences in terms of the degree of motivation (travelling on purpose, or not, to attend the event), previous knowledge of the event, rate of previous participation. Both Carnival and Flower Festival are able to generate high numbers of international tourists (including Portuguese nationals from the mainland), and as a result, high levels of tourism-related income along with the promotion of the region abroad.

The Flower Festival emerges as the event with the greatest potential for attracting repeat visitors, and with the greatest ability to ensure a memorable experience consistent with a high degree of satisfaction. It is worth mentioning that both the Flower Festival and the Atlantic Festival have targeted the tourist market segment since their inception, and lack elements of “authenticity” in terms of its roots in popular traditions, with decades of existence, but this does not stop them from providing memorable experiences (as expressed

<table>
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<tr>
<th>Variable</th>
<th>Carnival Coef. (Prob.)</th>
<th>Carnival Importance</th>
<th>Flower Festival Coef. (Prob.)</th>
<th>Flower Festival Importance</th>
<th>Atlantic Festival Coef. (Prob.)</th>
<th>Atlantic Festival Importance</th>
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<tr>
<td>Schedule</td>
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<td>0.728</td>
<td>0.200 (0.043)</td>
<td>0.188</td>
<td>0.128 (0.043)</td>
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<td>Press releases</td>
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<td>$R^2 = 0.563$</td>
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</table>

Table IV. Regression CATREG: variable-dependent satisfaction
by the degree of satisfaction). It is obvious that multiple rationalities in terms of the historical background, attendance and decision-making processes exist in harmony in this (ad hoc and informal) portfolio of events, which is to say that a number of commonalities and cross-leverage strategies can be worked on. As reported above, no radical discontinuities can be found regarding satisfaction and intention to recommend, two of the most common indicators of satisfaction, given the similarity of the mean values of satisfaction (5.7, 6.2, 5.8) and of intentions to recommend (80, 87, 73 per cent). It is also observed that tourists travelling expressly for the event report higher scores in terms of satisfaction (6.09 vs 5.64, 6.41 vs 6.06, 6.34 vs 5.87), which is also replicated by respondents reporting higher levels of prior knowledge.

The first results correspond to the DMOs’ best expectations, while the second points to the key importance of working properly the promotional campaigns underway and the dissemination of information to the targeted audience. Successful promotional campaigns and related interventions on the social networks will allow, in all evidence, an increase in the number of highly satisfied respondents with a consequent impact in terms of satisfaction and expenditure. And such campaigns are entitled to share a number of common elements (e.g., aim at both large audiences and market niches), and able to sustain cross-leverage strategies based on relatedness.

In fact, by taking into account the data, it may be concluded that Madeira succeeded in staging attractive festivals, regardless of the festivals’ leitmotiv, number of editions and time of the year. It can also be concluded that the Region offers an attractive product for a heterogeneous clientele. There are, as expected, significant differences in terms of the capacity to encourage repeated attendance, with the Flower Festival demonstrating the ability to create a more devoted following among its participants, but a number of commonalities are quite evident.

A number of additional conclusions can be derived from this study. First, the findings showed that perceived quality decisively influenced satisfaction and loyalty in each of the events under analysis (a key commonality identified in this study). This means that perceived

<table>
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<td>Average stay</td>
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<td>First visit</td>
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<tr>
<td>Promotion</td>
<td>-0.566</td>
<td>0.038</td>
<td>0.145</td>
<td>0.019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous assistance</td>
<td>-0.699</td>
<td>0.093</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Info. travel agency</td>
<td>-1.472</td>
<td>0.074</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table V. Stepwise logit regression: variable-dependent high satisfaction

- LL = -197.692; LL = -192.698; LRT2 = 61.15; LRT2 = -267.227; LRT2 = 99.34; Prob. = 0.000; Pseudo R2 = 0.1318; Prob. = 0.000; Pseudo R2 = 0.1567; Pseudo R2 = 0.3299.
quality had a significant effect on perceived value, satisfaction and loyalty. Organizers had
gone to considerable lengths to create some impressive and aesthetical pleasant images. This
has been a winning strategy, leading to high rates of return on the investment made.
Accordingly, organizers should look into possibilities of further increasing their competences in
staging beautiful theatrical performances, by applying the lessons learned through experience
to devise cross-leverage strategies.

Competences in defining convenient opening hours and other organizational aspects, in
general, can similarly become applicable (another example of a cross-leverage strategy) in
future events. In fact, a number of attendees made complaints on organizational aspects,
accessibility issues, as well as on opening hours and lack of information. Second, the results
of this study show that the festivals surveyed are highly diverse with respect to motivations
to travel. However, commonalities prevail (see Table VI), which suggests that the main
findings and lessons learnt in previous festivals can become applicable next month. The
festivals share common elements, objectives, resources and processes conducive to greater
customer satisfaction, which corresponds to the portfolio concept to a large extent.

The number of common issues underpinning the quality satisfaction nexus in any of the
surveyed festivals, suggests that leveraging strategies can be planned and organized under a
framework of common goals, resources and priorities to stimulate attendance and satisfaction.
A common pool of resources (personnel, experts on staged performances) can be used by
different events’ organizers. For that purpose, local officials need to establish appropriate
support mechanisms for the coordination of all features of event portfolio management. Many
of attendees’ travel to the region specifically because of the cultural opportunity presented by
the festival. In this case, it would pay to devise strategies to obtain higher levels of involvement
by studying programme and workshops appealing to this type of attendee.

An eventful city offers a portfolio of events “that are, inter alia, strategic, holistic,
provocative, participative, imaginative, and co-operative” (Thomas, 2011, p. 726). In a more
practical way, Richards and Palmer (2010) consider that eventful cities may result from a
number of initiatives such as developing from scratch new events, rejuvenating existing ones,
besides attracting one-off major events and encouraging the organic growth of local events
event in order to become hallmark events. To this end, issues of resources sustainability,
critical success factors and complementarities and synergies are worth of consideration
(Getz, 2017). A portfolio of events demands intentionality, defined by Antchak and Pernecky
(2017, p. 549), as the “extent to which all the procedures, activities, and portfolio scope are
strategic and intended to achieve certain objectives”.

While the literature provides a number of well-written assertions about how to deliver
cross-leverage initiatives, developed in collaboration with local stakeholders, in order to
achieve a number of social and economic outcomes, the practicalities of such measure are
not well defined. As observed by Thomas (2011) is not possible to guarantee that a city
offering a number of events will become an eventful city provided that “sufficient resources
are allocated to such undertakings”. In this paper, we argue that post-event analysis offers
the opportunity to select best practices and to identify commonalities and strategies aiming
at cross-leverage initiatives aiming at attaining the “eventful city” status (see Table VI).

In fact, Table VI describes a number of examples of commonalities and potential
cross-leverage strategies based on post-event analysis that should be interpreted by policy-
makers, event managers and alike as a “strategic community asset” (Ziakas, 2014, p. 348),
comprising transferable knowledge and expertise in an increasingly strategic area in the
field of tourism ready to be used by key actors to capitalize on the current portfolio of events
to attain a number of additional goals and strategic advantages (Ziakas, 2014, p. 344). The
efforts underway to monitoring visitors’ satisfaction offer the ability to increase
stakeholders’ awareness of a wide range of resources and experiences, as well as
feedback of shortcomings and criticism, besides opportunities to work together across
The characteristics shared by events in terms of tourists’ profiles, themes and critical factors of success provide ground to “cultivate critical complementarities” (e.g., overdependence on the older age cohorts) and to explore synergies to enhance the region’s destination image based on cross-leverages (Ziakas, 2014, p. 346). In all likelihood, opportunities in terms of new market niches, attractions, experiences and products strongly related to the island’s identity, heritage and culture can be envisaged at a minimum cost without any substantial investment being
needed (Kelly and Fairley, 2018). For example, opportunities to explore the local
gastronomy, shopping, history linked to the Discoveries could be linked directly and
explicitly to each events’ main celebration. However, any benefit to be derived from any
compilation of measures intended to promote leverage demands a proactive and strategic
stance in terms of identification, selection and implementation of initiatives.

Table VI offers the opportunity to further discuss and comment on the results obtained in this
study, based on an appraisal of the experiences related by other authors. For example, in line
with the accounts and case studies analysed by Ziakas (2014b), Dickson et al. (2018), Misener
(2015) there is scope to foster the dynamics of cooperation and inter-organizational relationship in
order to achieve high-order goals. For example, expertise in communicate, exchange resources
and experiences, and solve “minor” problems (e.g. complaints about lack of information) can be
translated in a collaborative culture deeply rooted in the principles of joint-problem solving and
forward-looking planning (Ziakas, 2014). Ziakas (2010) refers that events offer the opportunity to
develop a collaborative mind-setting and to achieve high levels of operational and strategic
efficiency. But, more mundane interest is also at stake. Kelly and Fairley (2018) and Pereira et al.
(2015) refer that a collaborative mindset empowers the local business community to develop and
explore new commercial opportunities. Other regions shared similar difficulties and shortcomings in excelling in this area, though not to the same extent, which suggests that
each destination must develop specifically designed leveraging strategies to help firms to tackle
the problems in establishing themselves successfully in the “events” market. Policy-makers and
strategists must resist the temptation to use ready-to-apply one-size-fits-all initiatives.

Another interesting resemblance between Madeira and other case studies reported in the
literature lies in the lack of an officially stated strategy and planning and/or “coordination
mechanisms” in the area of events (Ziakas, 2010, p. 146; Dickson et al., 2018), even if tourism
organizations are become increasingly involved in the event industry (Kelly and Fairley, 2018).
Antchak (2017), Giovanardi et al. (2014), Mariani and Giorgio (2017) argue in favour of an
institutional arrangements based on a clearly focussed and well-articulated set of goals,
transcribed in the establishment of formal strategies. Pereira et al. (2015) observed that the
planning and implementation process of a major nautical event that were “insufficiently
developed” lead to missed opportunities in getting the maximum benefit out of the investment.
However, Dickson et al. (2018) observe that the key to success lies in adopting a professional
attitude based on low levels of collaborative inertia among key public and private partners
rather than on formally established public bodies. Madeira has succeeded in establishing a quite
successful informal portfolio of events with the DRT directly in charge of most events. However,
a well-articulated strategy of accumulation of events can position the region to respond better to
market changes, by sharing with relevant stakeholders information on upcoming events. In this
regard, sustained effort must similarly be developed to highlight and nurture a number of
additional “mutual interests”, for instance, in the field of alternative market niches, culture,
arts and sports. Ziakas (2010, p. 162) understand events as the opportunity to connect “missing links” and to remove obstacles hampering further developments and an occasion for
mutual understanding.

Moreover, significant advances in resource-sharing offer ground to handle further levels of
complexity, for example, in terms of employing smart technologies to manage and to help
tourists to co-create their own experiences, in order to be more “responsive” to both tourists,
residents and commercial interests needs. The management of an event portfolio based on
high levels of tourists’ satisfaction constitutes a source of and a catalyst for learning, solution
development and testing of new forms of cross-leverages, and an opportunity to “secure a
competitive advantage in the market place” under the fundamental premise of making the
best use possible of the limited range of resources available (Kelly and Fairley, 2018, p. 325).

A final word must be reserved to provide a critical appraisal of the management
philosophy behind the current development of the events industry in Madeira. Our results
illustrate the dominance of the tourism-led economic growth paradigm coupled with an
overwhelming focus on a marketing agenda (Antchak, 2017), a tendency verified worldwide.
Antchak (2017, p. 293) refers that event planners in Auckland have been too focused in
delivering economic results, which limits the diversity and the multidimensional value of the
portfolio. Such an approach leads to incoherencies in terms of social, political and tourism
development, owing to the overwhelming predominance of one key theme (Clark and
Misener, 2015). In other instances (Kelly and Fairley, 2018, p. 342), event organizers
benefiting from subsidies may face “undue pressure”, to make changes “not congruent with
the core focus of the event”. Events in Madeira are over-reliant on tourism development
concerns as well, but it is undeniable that despite the market orientation of most events, the
degree of involvement of the local population it is quite high. Events in Madeira are clearly
focussed on tourism development goals, but community-based concerns are also taken into
consideration to a certain extent. DRT organizers are not entirely “agnostic” (i.e. economic
and marketing-oriented) on the nature of events (Antchak, 2017, p. 290), owing to the
undeniable historical and social roots of most events. Clearly, more research is needed to
find out how the analysis of commonalities and the implementation of cross-leverage
strategies permit to go beyond mere objectives of economic-centred tourism development to
embrace an inclusive, multilayer and holistic approach that ensures economic, social,
environmental and technological developments.

Conclusions

Based on the analysis of a portfolio of events that varied in historical background,
dimension, organization, period of the year, links to local traditions and reputation abroad,
we uncovered a number common factors offering grounds to manage the portfolio of events
in a professional manner through the lens of traditional satisfaction analysis (Downward
et al., 2009; Sato et al., 2014).

The festivals under analysis have succeeded in attracting a heterogeneous pool of
participants in terms of socio-economic status and nationality, but without compromising in
terms of satisfaction. Seemingly, similar behaviour patterns govern the interaction of those
surveyed, regardless of which festival is under analysis. For instance, participants who are
intrinsically motivated to attend an event reveal the greater capacity to transform their
attendance and participation into a memorable experience and into satisfaction.

However, casual attendees behave in a fairly similar fashion. It translates into the
ability to meet expectations. It is inferred that repeated participation will tend to reinforce
loyalty and repeated visits to the region. Data suggest that extremely satisfied
participants and attendees tend to report higher average daily expenses, in any of the
three events, though it does not necessarily correspond to higher levels of average income.
There are reasons to suggest that the emotional dynamic generated by the festival will
tend to create a greater predisposition and liberty to spend, which goes in line with the
initial expectations of festival promoters.

Other data worthy of a more detailed analysis relates to the attendee’s profile. Registered
figures regarding age, average income, marital status, level of education, average stay and
number of previous visits to the region suggest that festivals attract, in addition to those
who travel to the destination deliberately for the event, a huge number of tourists who are
visiting the island at the time of the festival (just passing by). Aside from the well-known
Flower Festival, which attracts a large pool of fans, both the Carnival and Atlantic Festival
survive by means of the passing by tourists present at the time of the festival, which is still a
legitimate method to attract tourists. With regard to satisfaction, the reduced impact of the
socio-economic variables highlights the key role of event production and organization in
engineering satisfaction among attendees. The main concern is not attendees’ background;
emphasis should be put on capturing their attention via attractive, creative, organized,
conveniently scheduled and well-advertized events. This means that the event organization depends essentially on itself to maintain high satisfaction rates.

Developing a learning mindset congruent with portfolio aims and with attendees’ needs, aspirations and expectations is clearly a necessity. Well-established destinations face increased competition from newer competitors making it necessary to identify new ways of being competitive by offering aesthetically pleasing events, value for money and memorable tourist experiences, while preserving the current competitive advantages (Mariani and Giorgio, 2017, p. 89; Coghlan et al., 2012; Snepenger et al., 2004; Jamal and Getz, 1995). In this regard, the role of the DMO is increasingly important in terms of planning, leadership, research, product development and innovation (Mariani and Giorgio, 2017). In this study, we provide evidence to state that tourists’ satisfaction may increase as a result of innovations in terms of creativity and aesthetic elements, besides extra offerings, which illustrates the importance of studying and understanding tourists’ perceptions and expectations.

The accomplishments of the region in organizing successful events and the growing importance of events in attracting tourists suggest that the destination must upgrade the image being conveyed abroad for decades, purposing to highlight the events being staged as a source of new, meaningful and rewarding experiences that can be a great source of satisfaction for tourists. The image of the destination conveyed abroad was characterized by a high degree of emphasis on a few main themes. Broadly, a set of motivations based on the nexus nature-relaxation prevailed. Further campaigns promoting the region can be cross-leveraged via incorporation of extra themes centred on the rewarding co-produced experiences, meanings, feelings and surprises linked to the main events being staged.

Theoretical and practical implications and further research
The relevance of the concept of event portfolio in events’ studies is well-established in the literature, and the concept plays an increasingly important role in management of and the logic behind multi-annual programming of events “event policy domain” (Antchak and Pernecky, 2017). Given the dearth of research on real-life cases of portfolios of events, from the point of view of the attendees, in contrast with the current availability of a number of theoretical papers, this paper has sought to address the relatively lack of empirical studies examining the concept of event portfolio based on the descriptive analysis of a number of issues pertaining to a portfolio of events from a demand-centred point of view (Todd et al., 2017).

A number of contributions can be drawn both from a theoretical and methodological point of view and in terms of management practice. The findings of this study enrich the literature on events in several ways. In terms of its theoretical contributions, this study adds new insights to the literature on event portfolio by highlighting the main characteristics of an ever-growing and tourism-oriented portfolio of small-scale events, developed in an ad hoc and informal manner, and portfolio of events, without any formal agenda, which has been rarely addressed in the literature. This is a relevant contribution owing to the growing number of ad hoc portfolios of events being fuelled over time with the development of new events in order to commoditize untapped resources and to extend the tourist high-season. Under such circumstances, a fully understanding of the main characteristics and inter-relationships between events is only feasible in a post-implementation phase.

Though the present study describes a specific geographical background, the findings and results outlined in this study are of relevance to other destinations in need of give meaning to a separate set of events. An important insight from this study relates to the “blurring” of events’ main role and critical factors of success. As noted previously, the events under analysis attract a relatively indistinct audience sharing a high level of satisfaction, being impacted by a common pool of critical factors of success. As shown above, idiosyncrasies pertaining to different socio-demographic backgrounds, previous
experience and economic status appear to be relatively unimportant in explaining satisfaction. As discussed, events attract a relatively similar audience.

The uncovering of these characteristics has potential “implications” in terms of understating the main characteristics of the event’s audiences and the potential links with the main product being advertised and main comparative advantages of the destination, in order to develop a symbiotic relationship between the events sphere and the destination strategic development/priorities and strategies. In a similar vein, this study contributes a new perspective to the portfolio of events under analysis in terms of the design, organization, production and post-event analysis/marketing of the events (Li et al., 2013). In this regard, the issue of applying lessons to the design and management of brand new events based on the engagement of the destination main resources is worth of consideration.

This study also reveals the extent to which events with a distinctive history and origins, but organically grown over time, share a number of commonalities, which allows for the development of cross-strategies. This paper also brings to the fore the need to examine the (Ziakas and Costa, 2011) the inter-relationships between the meanings of the attendee’s experiences and the characteristics of the destination (motivations to visit the regions), by studying how region’s symbolic elements affecting the attendees’ experiences.

Second, this research focusses on the European periphery, which has received little attention outside studies on sea-and-sun tourism. And third, the research developed in this study identifies a number of commonalities giving purpose, meaning, grounded logic and a workable basis to officials and managers. Limited marketing resources and increased competition from other destinations suggests that destinations on the periphery need to develop their portfolio of events in an effective manner.

This study also offers a methodological contribution by outlining the key benefits of establishing a partnership between official entities and the University for research purposes, as it is usually difficult and impracticable to conduct surveys in open spaces. Based on a relatively simple instrument, it was possible to gain an understanding of the attendant’s profile and to uncover new knowledge of a real-life portfolio of events. The use of the collection data procedures defined in this study was “valuable in eliciting” a number of relevant facts and conclusions. The method employed in this study could be replicated in the similar research setting to uncover the specificities of the audiences and how to engage each event with each other.

The findings of this study offer several practical implications for festival organizers and managers undertaking efforts to create conditions for improving the degree of relatedness of the current portfolio of events. From a managerial perspective, destination managers endeavouring to add strategic meaning to event portfolios developed over time in an ad hoc manner could take into consideration and learn from the methodological approach retained in this study. Festival managers have much to gain from pursuing a strategy based on improved levels of quality in order to increase the reported levels of satisfaction. Managers may regard the critical factors of success identified in this study as the foundation to pursue a strategy of development strongly anchored on technical aspects (expertise, aesthetical and dramaturgical aspects and practical organizational issues such as opening times). Grounded on the relatively irrelevance of segmentation strategies based socio-demographic data identified in this study, managers may envisage the saliency of events in tourism management from a different prism.

Quality emerged as a major factor impacting satisfaction and loyalty. Because perceived festival quality is a significant predictor of loyalty, managers must excel in producing festivals offering superior value for attendee. Given that no major significant differences are discernible between casual attendees and purposeful attendees, managers can pursue, to a certain extent, a one-size-fits-all approach, based on the commonalities identified in this study. Any gains in perceived quality positively impact any type of attendees’ degree of satisfaction. Focus on quality and satisfaction should be at the centre of the stage. The “saliency” of attendees’ needs in terms of socio-demographic is likely to be less “pronounced” that those
ones relating to organizational. More important than market segmentation is the analysis of consumer demand-based factors affecting satisfaction.

Future studies should focus on identifying the nature of the experience, the level of involvement of the participants, and conditioning factors that limit accessibility to such events as well as the satisfaction-daily expenditure nexus. Future analysis should address the limitations of this current study. One of the main limitations of this study related to the specific setting under analysis. Madeira is not endowed with a richness of archaeological, historical and cultural resources and practices that may allow the DMO to successful marketing a highly attractive cultural spot abroad. However, tourism industry in other regions is likely to face a number of quite “similar circumstances” in terms of managing disparate events, “requiring them” to adopt similar strategies. For that reason, a number of conclusions may be of relevance to other event tourism and destination management settings. The main findings could also be of interest in other organizational settings sharing similar characteristics within the cultural and event industries.

It should be pointed out that the questionnaire conforms to the immediate needs of information of the DRT, lacking a relatively complex theoretical and conceptual framework to analyse satisfaction. Ideally, the recommended line of research should be rooted in the field of anthropology or sociology, with the intention of identifying the production of meanings associated with festival attendance, besides highlighting issues such as place attachment, identity, personal statement and involvement in cultural subjects. Respondents should be asked about access to information, the role of hotel reception desks and travel agents in providing accurate information, the location of hotels in relation to the urban geographical area surrounding the events and organizational aspects, and daily planning whilst on holiday to understand festival attendance.

It would also be important to understand the extent to which the participation in events triggers a greater predisposition to incur higher levels of daily expenses. In that sense, we suggest additional efforts centred on the issues of accessibility (travelling from the hotel to the city centre), promotion conveyed abroad in the pre-event phase and in-locus promotion prior to the event. Before undertaking a further anthropological and sociological analysis based on qualitative methods, it is important to collect additional data to understand the underlying rationality to attend from a marketing perspective.

Trindade et al. (2018) argue for the application of an event satisfaction index, in order to improve services for attendees in the next edition of a recurrent event, via adaptation of the current product to attendees’ preferences. Further research may contemplate a detailed analysis of the different aspects of the organization, production and ancillary services and aspects of attending events, such as accessibility. A preliminary analysis (results not shown) suggests that attendees’ satisfaction diminishes with the distance to be travelled from the hotel and the event main venue, which is understandable in view of the large number of elderly people watching the events.

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**Further reading**


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The social utility of small-scale art festivals with creative tourism in Portugal

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Abstract
Purpose – The purpose of this paper is to address the gaps in research on strategic planning for the social impacts of small-scale events in rural areas and small cities. This is achieved by investigating the social utility inferred by small-scale art festivals with a creative tourism element in terms of increasing social capital and positive social change, from an event stakeholder perspective.
Design/methodology/approach – The identified gap in knowledge is addressed by using interviews and fieldnotes from participant observation to co-create meaning with the organizers of four small-scale art festivals in small cities and rural areas in Portugal. Theoretical frameworks relating to creative tourism development and social capital creation are used to analyze the social utility of small-scale art festivals.
Findings – Creative tourism activities are integrated within small-scale art festivals in small cities and rural areas in various ways, mainly through art-related workshops. Significant empirical data give insight into how small-scale art festivals create social value by increasing the host community’s pride and reinforcing the social fabric of the festival’s local and “portable” community, in part through these creative tourism activities.
Research limitations/implications – One of the limitations of this study is that it focuses on the perspectives and insights of the festival organizers. An analysis of the festival participants’ views, local community stakeholder analysis and community impact analyses would offer further insights into how the creative tourism experiences and other moments of shared meaning generation within small-scale art festivals influence the creation of social utility.
Originality/value – This paper offers insights into how creative tourism activities are being integrated into small-scale art festivals in small cities and rural contexts, and how these activities foster social connections among festival participants and with the local community. This addresses significant gaps in the literature on strategic planning for the social impacts of events, particularly in the context of small-scale events in rural areas/small cities, and the strategic value of including creative tourism activities within small-scale festivals.

Keywords Strategic planning, Social capital, Art, Creative tourism, Shared meaning, Small-scale festivals

Paper type Research paper

1. Introduction
Events play a significant part in structuring and maintaining societies and are a phenomenon inherent to humans and social groups (Pernecky, 2013). Festivals, defined as “the celebration of a specific theme to which the public is invited for a limited period of time” (Grappi and Montanari, 2011, p. 1129), are one of the fastest growing types of events, and have increased in number, diversity, and popularity since the 1980s (Akhoondnejad, 2016). Festivals can be seen as a strategy to achieve economic development through connecting to tourism, as a means to enhance the life of local people, and as a way to reinforce social cohesion within communities (Lee, 2014). Small-scale festivals in particular are frequently associated with social connectedness and cultural vitality in smaller communities and rural areas. In this context, the word “community” can be used to describe a group of people who share identity,
common interests, and shared beliefs as well as a group of people unified by the geographical territory they occupy (Liepins, 2000).

Festivals are often perceived as creating tighter social networks and connecting local populations, especially within the context of small-scale events (Taks et al., 2015). Festivals can give people a reason to celebrate together, mark the passing of time, and build social networks or social capital within communities (Wilks, 2011). Festivals can also be used to deliver political messages to an audience (Mair and Whitford, 2013) and can provide an open platform for the public’s political expression and dialogue (Georgievska-Jakovleva and Pavlovski, 2015). Festivals can achieve these social benefits by providing occasions when communities reify their group identity and when participants can signal their commitment to the common good (Rao, 2001). A festival can provide a “symbolic social space wherein event participants instantiate a shared and valued sense of community” (Ziakas and Costa, 2012, p. 28) with a host community’s practical and existential issues shaping the meaning that an event conveys.

However, recent research highlights the complexities inherent in achieving the festival’s social inclusion goals, one of which relates to whether the “geographically local” community benefits from these goals, rather than just the festival’s “portable community” (Laing and Mair, 2015). The concept of “social utility,” defined as “the accumulated social value an event derives as a result of implementing strategies to attain and magnify social capital, community capacity and positive social change” (Ziakas, 2016, p. 1137), is instrumental in understanding the key dynamics associated with planning and implementing small-scale festivals. Social capital can be generated in festivals when reinforcing ties within the community, whether by creating common knowledge, building trust, or facilitating the formation of networks and increasing social cohesion (Coleman, 1988).

While some research has been conducted on how festivals link to tourism in an urban context (Newbold et al., 2015), more limited research on this link exists for rural contexts (Gibson and Connell, 2011; Stevenson, 2016). There is a need to consider “the countryside” or the “rural” as a place where the creative economy is differently manifested and articulated from the now standard “creative script” based on cities (Bell and Jayne, 2010). In a rural and small cities context, small-scale festivals can be significant events as they have the potential to periodically renew a community, demonstrate the value of local institutions to the local population, and provide a platform for community involvement and cultural development (Black, 2016). Community members in rural areas in particular may view the festival not only as a money-making tourist attraction, but also (and perhaps primarily) as an enjoyable community-based event that boosts community pride and where they participate as either host or visitor, or both (De Bres and Davis, 2001).

Within the context of creative tourism, which can connect artisans in rural areas with tourism (Bakas et al., 2018), small-scale local festivals can create both a context and a link between the local community and visitors. Creative tourism is a tourist activity that incorporates four dimensions: active participation, creative self-expression, connection to place, and community engagement (Bakas and Duxbury, 2018). This paper draws on empirical data co-created through interviews and discussions with the organizers of four small-scale art festivals located in the central (Centro) and northern (Norte) regions of Portugal that are participants in the CREATOUR project. “CREATOUR: Creative Tourism Destination Development in Small Cities and Rural Areas” (2016–2019) is a three-year research and application project in Portugal that aligns with rural development goals of reviving and sustaining local crafts and traditions and providing a meaningful platform for visitors to engage with the local community.

This paper begins by contextualizing these small-scale art festivals in terms of the changing Portuguese “rural” and its intersection with creative tourism. It then examines events tourism research on small-scale, locally organized festivals and on the social utility of festivals.
The methodology of the current study is outlined, and the results and analysis are presented according to two key themes that emerged in the study: small-scale art festivals as fertile ground for the evolution of creative tourism activities, and the social utility of small-scale art festivals in the rural/small cities Portuguese context. The paper concludes with an overview of research findings and suggestions for addressing the limitations of the current study in future research.

2. The “rural” and creative tourism

In recent decades, rural areas in southern Europe have experienced the waning importance of agriculture to their general economy, the decline of farming populations, a reduction of incomes, greater structural complexity of employment, and the effects of transformations associated with the European Union’s Common Agricultural Policy (Verinis, 2011). In Portugal, a threefold narrative on the rural has emerged in lay discourses: a “pre-modernity” discourse, in which rural areas are generally portrayed as less developed and in need of change; a productivist perspective, which associates the rural with agricultural modernization; and a “rural renaissance” vision, in which the countryside is understood as a repository of traditional cultural values and as in need of preservation (da Silva et al., 2016). Accompanying this third narrative, we observe the emergence of a countryside whose economic foundation has shifted from agricultural production to become a site of consumption, tourism, and recreation.

Rural areas are increasingly associated with both “escape” and “renewal,” fueling the development, for example, of “digital detox” camps (e.g. http://digitaldetox.org) and “mindful travel” strategies popular among travelers from (at least) Europe and North America (Chen et al., 2017; Currie, 2005). The “rural idyll” attracts tourists to rural areas and engenders a “value of remoteness” in which distance from urban obligations creates an environment for “de-stressing” as well as a creative freedom to experiment (Matarasso, 2004, p. 25). Furthermore, in rural communities the arts and creative enterprises are considered strategic sectors in regional revitalization because they can stimulate community cohesion and also provide tourism-based and export-based opportunities (Duxbury et al., 2011).

In recent years, small-scale festivals in rural areas have been increasingly leveraged as an economic tool, stimulating short-term employment and improving the skills and capacity of residents to find work and re-invent place images, particularly in view of changing demographics and declining industries (Ortiz, 2017). While most rural festivals are modest, socially motivated, and not especially geared to tourism, they are significant because they provide a platform for community involvement and cultural development and because of their sheer quantity and geographical ubiquity (Gibson and Connell, 2016).

At the same time, tourism has often been seen as a destructive force for local crafts and traditions because of the perceived alterations in local traditions that occur through their touristification. In light of these concerns, creative tourism is a novel and active way of both preserving and extending cultural heritage as creative tourism products are inspired by and built locally from the distinct endogenous resources of local places and people (CREATOUR, 2017; Duxbury and Richards, 2019; Remolado et al., 2019). Creative tourism is also fueled by the new paradigm of the twenty-first century according to which tourists strive to find “transformative” experiences, focus on self-development, are more conscious of their actions, and want to be active participants in tourism experiences rather than passive observers (UNWTO, 2016). Through creative tourism, visitors can “get under the skin” (Landry, 2010, p. 37) of a place as they engage in everyday activities of locals (and with locals), which comprise the new “exotic.” Modern interpretations of creative tourism understand that tourist activities have the opportunity to co-create and co-preserve local traditions while also providing participants opportunities to develop creative skills and engage with the local community (Duxbury et al., 2019). The contemporary vision of creative
tourism has an expanded focus on connections between travelers and residents, and places importance on rooting creative intangibles to the specific place in which activities occur (Blapp, 2015; OECD, 2014). Recent research into the creative tourism development and presentation frameworks emerging in Portugal (Duxbury et al., 2018) found that creative tourism in rural areas is being brought to the public through five main frameworks:

1. local artisan/producer networks – developed by municipalities, development associations, and private initiatives;
2. small-scale art festivals;
3. accommodations + (including artistic residencies);
4. thematic series of related events and workshops; and
5. stand-alone “signature” activities.

Within this array of approaches, we are observing that small-scale art festivals can provide a critical mass of activity and marketing, which is required to attract creative tourists to rural areas for the duration of a few days. However, limited literature addresses the ways in which creative tourism activities are successfully integrated within small-scale art festivals and the resultant social impacts.

3. Festivals and community engagement

In the past, festivals were often hidden within the literature on cultural tourism with only limited attention in events tourism literature (McKercher and du Cros, 2002; Richards, 2007). However, today the study of festival tourism is an area of growing interest (UNESCO, 2015) and various approaches are being taken to investigate it. One stream of research has focused on the economic analysis of festivals, aiming to estimate an aggregate measure of income and employment change attributable to the festival and then calculating local multiplier effects (e.g. Kostopoulou et al., 2013). A second stream of festival tourism research has examined festivals as events in the context of place marketing, urban development, tourism, and social change (Picard and Robinson, 2006; Brito and Richards, 2017); their role in producing a direct and indirect sense of place (Lau, 2016); and tourist motivations to visit festivals (Kitterlin and Yoo, 2014), including the role of cultural identity and awareness of local traditions in attracting tourists to small-scale festivals (Stankova and Vassenska, 2015).

Much of the research and debate on the impact and roles played by small-scale festivals in regional development concentrates on their potential to attract tourists and therefore benefit the local economy (Comunian, 2015). Empirical studies of small, local festivals within the tourism field show that these festivals have short-term impacts and direct, tangible outcomes such as adding jobs, hotel rooms, and business revenues (Felsenstein and Fleischer, 2003). Festivals are also frequently viewed as a training ground for providing hands-on experience with logistics, hospitality, or human resource management (Johnson et al., 2011). In small regional towns, a festival can be instrumental in mobilizing local cultural forces and resources, stimulating creative interventions, and planning activities that can affect local development and regeneration processes (O’Sullivan and Jackson, 2002). Tourism spin-offs deriving from the promotion of festivals are seen as one way of combating rural decline (Walmsey, 2003).

The positive impacts of small-scale festivals extend far beyond income generation, however, and can include strengthening the social fabric and identity of local communities and enriching the quality of life of small towns (Gibson and Connell, 2016). Festivals can help host communities create and promote a positive image of the host community in the minds of both residents and prospective visitors. In related situations, non-mega sporting events have been shown to create tighter social networks and increase the connectedness of...
the local population, compared to mega-events (Taks et al., 2015). Hosting small-scale events, which often means that locals get involved as volunteers in the event, can contribute to increased community spirit and pride (Gibson et al., 2012). In the rural USA, festival success is attributed to boosting a local community’s pride of place (Waterman, 1998).

Small-scale festivals, as leisure activities that foster a festive sociability, can allow for the creation of social capital as they provide opportunities for social interaction, increasing social cohesion, encouraging the participation of specific social groups, and providing the potential for richer social ties (Glover and Hemingway, 2005). Some research (with policy and operational implications) emphasizes the accessibility of the cultural event through free or nominal entry fees for local residents and particularly for lower socio-economic groups (Johnson et al., 2011). However, it should not be assumed that events are uncontested and accepted as positive opportunities (Chalip, 2006). For example, while festivals are a source of community pride and an expression of shared values and identity, the accrual of social capital may be uneven, thus exacerbating existing inequalities, as shown in research on two festivals in East London (Stevenson, 2016).

Such issues have informed a growing body of literature exploring the potential of events to develop social capital (Pernecky, 2013). Social capital can be defined as the features of social life (networks, norms, and trust) that enable participants to pursue shared objectives and is the force that binds society together, transforming egocentric individuals into members of a community with shared interests, and is linked to co-operation and reciprocity (Ziakas, 2016). Various types of social capital have been identified, for example, bridging social capital refers to links among people who are dissimilar, bonding social capital refers to links among people who are similar, and linking social capital refers to vertical connections with people in positions of authority (Vidal, 2004). Any institution that reinforces ties within a community, whether by generating common knowledge or by building trust by some other means, is building social capital by facilitating the formation of networks and increasing social cohesion (Rao, 2001).

Past research has found that festivals can create social capital by promoting connectivity among diverse elements, such as the festival volunteers, local residents, festival tourists, and performing artists, thus increasing these persons’ collective social capital (Brennan-Horley et al., 2007). Shared meanings created within a festival can facilitate a heightened sense of community and strengthen a community’s social capital. Other elements of social wealth, such as trust and co-operation, can be nurtured through participation in cultural activities. Participation in local events is linked to the social development of community and creation of social capital as it encourages people to move beyond individualism, encouraging them instead to engage in social activities of shared meanings that will promote justice and co-operation, and to become more involved in the civic life of their community (Ferreira and Duxbury, 2017). Festival organizers can strategically develop a performative social space aimed at contributing to social utility, countering social exclusion, and fostering community development (Ziakas and Costa, 2012).

Nonetheless, recent research has shown that festival organizers often focus on the “portable community” (Laing and Mair, 2015, p. 252), that is, the festival-goers, in their efforts to encourage social inclusion, but have more limited success in reaching out to local residents. Some research on the influence of festivals on the local community’s well-being shows no significant relationship between festivals and the subjective well-being of residents (Yolal et al., 2016). This opens up the question of how to strategically foster a festival’s social impacts on the local community and, indeed, how festivals should engage with their local community.

4. Methodology
4.1 Methodological approach and processes
This article’s methodology incorporates an ontology that important knowledge lies in the ways in which the festival organizers perceive themselves and the festivals they manage, from which
they act. The local, context-bound knowledge produced from this examination is non-
generalizable and does not purport to universal positivist claims of truth about festival
gothers' conceptualizations of their roles. However, this research is of significance in
furthering event tourism theorizing by providing a rich description of context-bound realities
and the dynamics that occur within these situations. As social life is a result of interactions,
qualitative research is used to make visible participants' knowledge, insights, and opinions and
to interpret these in terms of the meaning they attach to them. Social life is dependent on
conversations, and we are inspired by Lincoln and Guba's (1985) definition of an interview as a
"conversation with a purpose" (p. 268). In order to investigate social change, in-depth
conversations are necessary. The knowledge created in these conversational interviews is co-
constructed between interviewer and interviewee as both persons bring together their
interpretations of meaning and somewhere between what the participant says and what the
interviewer understands. This knowledge is created from these interactions.

The empirical evidence for this study was gathered in 2017 and 2018 through in-person
interviews held during on-site visits where ethnographic accounts of the festivals were also
captured through fieldnotes and participant observation. Since festival organizers select the
participants, set out themes, and provide other aspects of direction, they can be seen as
knowledge "gatekeepers" (Derrett, 2003) in this context. Hence, festival organizers were
selected as the most appropriate people with whom to co-create knowledge for this paper.
The in-person interviews that inform this study were held during each festival, at the
festival location. They were recorded using a portable recording device and then
transcribed. In total, there were five semi-structured interviews. Three out of the four
festival organizers were interviewed in Portuguese by native Portuguese speakers and the
final one was interviewed in English by a native English speaker. All transcripts were then
translated into English by a native English (and Portuguese) speaker. The interview guide
consisted of six open-ended questions addressing the following topics: preparation of
creative tourism activities, development of the activities, impacts on the community, how
the activity went, the future sustainability of the project, and how the CREATOUR project
could help to improve initiatives developed by festival organizers. Fieldnotes were recorded
within a pre-prepared framework that had sections on logistics, activity development,
creativity and culture, community impacts, and a general comments section. In total, five
sets of fieldnotes were recorded.

Data from the fieldnotes and interviews were initially analyzed using open coding,
according to which the researchers broke down the data into parts, looking for similarities
and differences, and coded it using themes from the literature. A stage of focused coding
then followed which involved the examination of reoccurring codes in the data and grouping
them into larger overarching themes. Each of the four authors checked the themes and
suggested changes, after which the final key themes discussed in this paper emerged.

4.2 Contextual parameters of the study: the small-scale local festivals studied
The four small-scale festivals chosen as the basis of this study are geographically situated
in small cities or rural areas in the Norte and Centro regions of Portugal: Encontrarte
Amares, Festival “L Burro i L Gueiteiro,” Estival festival, and 180 Creative Camp. These
festivals are all part of the CREATOUR project, which involves five Portuguese research
centers working with a range of cultural/creative organizations and other stakeholders
located in small cities and rural areas in the Norte, Centro, Alentejo, and Algarve regions of
the country. Each of the festivals is briefly described below, complemented by Table I
presenting further relevant characteristics, including the creative tourism activities
integrated within each of them.

4.2.1 Encontrarte Amares, Municipality of Amares, Norte region. The first edition of the
Encontrarte Amares festival was held in 2009 and it has a biennial periodicity. The festival aims
<table>
<thead>
<tr>
<th>Festival name</th>
<th>Year founded, frequency, and duration</th>
<th>Venue type</th>
<th>Entry fee (€)</th>
<th>Number of participants</th>
<th>Creative tourism activities</th>
<th>Involvement of locals?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encontrarte Amares</td>
<td>2009 Biennale 5 days</td>
<td>Around city</td>
<td>Free (free for locals)</td>
<td>950</td>
<td>Open rehearsals(e.g., folklore group), guided visits to set up the exhibitions of the festival, activities in the artistic residences, workshops/activities of painting, sculpture, gastronomy, clay modeling workshops and Cyanotype printing workshop</td>
<td>Community involvement was high with about 130 residents working with the Encontrarte Amares team to develop artistic projects</td>
</tr>
<tr>
<td>L. Burro i L Gueiteiro</td>
<td>2002 Annually 5 days</td>
<td>Moves from village to everyday</td>
<td>Member price: €70; Non-member price: €85 Special price for locals: all days: €50; one day: €15 volunteers</td>
<td>450 + 40 volunteers</td>
<td>Percussion workshops; dance workshop of <em>Miranda</em> region dances, e.g., dance of the <em>Paiolitos de Miranda</em>; workshops in folk and electronic music; workshop to learn about caring for donkeys; visits to traditional houses to observe their architecture; learning about the ecological role of the architecture of <em>dovecotes</em></td>
<td>Community involvement is mainly in the form of local people who help in the organization (cooks, cleaners, security, logistics) and musicians who play during the donkey walks. Local residents provide the spaces where the workshops take place</td>
</tr>
<tr>
<td>Estival</td>
<td>2008 Annually 1 week</td>
<td>Dedicated farm/camping area</td>
<td>€250 Special price for locals: free</td>
<td>40 + 25 artists + 25 volunteers</td>
<td>Mosaic-making, felting, wood sculpture, dance, theatre, stand-up comedy, comic book design, singing</td>
<td>Locals are involved in cooking for the one-day village celebration where locals and festival-goers meet, and performing (village choir and musicians)</td>
</tr>
<tr>
<td>180 Creative Camp</td>
<td>2013 Annually 8 days</td>
<td>In the historical city center and in a few outskirt locations</td>
<td>€250 Special price for locals: free attendance to night music events</td>
<td>Up to 120</td>
<td>Every year there are 4 full day parallel workshops with invited artists (photography, drawing, illustration, publishing, animation, architecture, cardboard mask-making)</td>
<td>Increasing number of local young participants, involvement of Abrantes Musicians Academy in a major music event, local association provides transport services, 160 children from a school vacation program attend several workshops</td>
</tr>
</tbody>
</table>
to connect people with the arts through promoting artistic experimentation. Encontrarte Amares (Plate 1) has a multidisciplinary program (e.g. contemporary art exhibitions, artistic residences, and educational activities) and a lively dialogue between the radicalism of contemporary artistic expression and the traditional heritage of the Minho region. During the five days of Encontrarte Amares, an environment of experimentation, participation, conviviality, active contemplation, and freedom of thought is fostered. The festival also promotes the region’s immaterial heritage, highlighting local gastronomy, customs, images, sounds, stories, and know-how. Community involvement is high with about 130 residents working with the Encontrarte Amares team to develop artistic projects. These local participants include residents involved in local associations and enrolled in schools, who have the opportunity to work together with visiting artists. Local residents also provide some accommodations for the artists and work on making bags and other festival materials.

4.2.2 Festival “L Burro i L Gueiteiro,” Miranda do Douro, Norte region. The Festival “L Burro i L Gueiteiro” is an annual itinerant festival that travels between three villages and is linked to the traditions of the Miranda do Douro subregion (Plate 2). Occurring at the end of July each year, about 450 people participate in this festival annually, including artists and volunteers. Focused around the breed of traditional donkeys of Miranda, this alternative traditional festival serves as a way of preserving this breed as well as preserving local culture. Workshops within the festival focus on traditional music and dance of the region and on playing traditional instruments, in particular, the bagpipe. The traveling festival takes place in several parishes of the county, moving all the logistics, staff, and activities from village to village, accompanied by donkeys, which are the main attraction of this itinerancy. Most participants reside in large tents and comprise a variety of ages, from teenagers to retirees. Local community involvement is mainly in the form of participating in the operational organization of the event (i.e. as cooks, cleaners, security, logistics coordinators, etc) and as musicians who play during the inter-village donkey walks. Local residents also provide the spaces where the workshops take place.

4.2.3 Estival festival, Vale de Mondego, Guarda, Centro region. Estival is an annual art festival held in a farm owned by a Dutch couple and operated by the FAIA Collective, a
cooperative of young entrepreneurs educated in philosophy, psychology, biodynamic agriculture, ecology, and gastronomy. About 80 people participate in this annual week-long festival, including artists and volunteers. The majority of participants are Dutch and range in age from teenagers to retirees. Participants engage in workshops such as theatre, stand-up comedy, singing, dancing, wood sculpture (Plate 3), felting, mosaic-making, and graphic design/animation, and most stay in large tents. Each evening there are artistic performances, many created within the workshops (e.g. a theatrical performance), and on one evening everyone goes to the closest village to eat and dance with the local residents. Local residents are involved in cooking for this one night-time event, a village celebration where local residents and festival participants meet to eat and dance. The village female-only choir performs at the festival, singing traditional Portuguese songs.

4.2.4 180 Creative Camp, Municipality of Abrantes, Centro region. The 180 Creative Camp is an eight-day creative bootcamp that occurs in Abrantes, Portugal, on the first week of July each year. Its first edition was in 2013 and since then it has evolved into what is now a triplex concept: academy, featuring a series of workshops, conferences, and projects developed; factory, involving public interventions (Plate 4) and content productions with the local community; and festival, presenting concerts, live cinema, exhibitions, and public activities. The event attracts and hosts young “creatives,” most between 18 and 35 years old, from all over the world. The 180 Creative Camp provides time and space for these young creators and invited artists from a wide variety of disciplines (such as design, architecture, art, music, video, photography, illustration, and installation) to learn from each other, exchange experiences, and create together. Community involvement is found in the form of 160 children from a local school vacation program participating in several workshops, including an animal mask-making workshop, performances by the Abrantes Musicians Academy at a major music event during the Camp; and a local association providing transport services for festival participants.
5. Results and analysis

Our findings indicate that these small-scale local festivals act as development frameworks for creative tourism activities and that within the context of small-scale festivals in rural areas and small cities, the integration of creative tourism activities can increase the social utility of festivals.
5.1 Small-scale festivals as fertile ground for the evolution of creative tourism activities

Festival contexts have long been associated with opportunities for experimentation and “trying something new,” which can provide a fertile setting for developing and evolving creative tourism activities. Hands-on experiences in the form of creative activities are something that festival participants often demand; as the Estival organizer says, “Initially the workshops were for performative arts, but people started to say that they wanted to be creative with their hands. This was something I added to the program” (Estival, site-visit interview, 2017). In festivals that include a number of creative workshops, the act of engaging in these creative practices tends to neutralize the environment, encouraging people to experiment with new ideas and helping them express themselves more freely. The Encontrarte Amares organizer says that the festival creates a “different atmosphere” that encourages experimentation and free expression (Encontrarte Amares site-visit interview, 2017). Many of the festival organizers say that their festivals create “socially safe” spaces for the participants to experiment with activities that they might not try outside this environment. For example, the organizer of Estival observes that “people feel very safe to be and to participate here – it is physically and socially safe!” (Estival, site-visit interview, 2018). In Miranda do Douro, the itinerant festival engenders social closeness and a lot of participation, especially evident in the collaboration required for the daily tasks of the festival (i.e. transportation, organization, food, and general logistics), which translates into a very “familiar” environment (L Burro i L Gueiteiro site-visit interview, 2018). This type of environment, created within small-scale festivals, contributes to building social capital and cohesion among participants, as participants both engage with each other and collectively learn together about the specific cultures of the rural places and small cities they visit.

Elements of social capital, such as trust and co-operation, are also nurtured through participation in cultural activities such as the creative tourism activities in the festivals. In the four small-scale art festivals examined, it is observed that the creative tourism activities incorporated within each event facilitate interaction between various groups of people that do not usually mix, including artists, local residents, children, and elderly people. This mixing of volunteers, artists, participants, and local residents who have a wide spectrum of backgrounds and interests can facilitate interaction across social strata, ethnic backgrounds, and gender and age divides, increasing social capital for all involved. At Encontrarte Amares, for example, it is specifically the mixing of artists and other participants that increases the festival’s social utility; as the organizers note, “Encontrarte creates a different atmosphere, it has artists wandering around, working directly with the local population […]” (Encontrarte Amares site-visit interview, 2017). This “different atmosphere” talks to the bridging social capital that is being generated as bonds between people who are dissimilar are created through these interactions.

The creative tourism workshops within the small-scale festivals are particularly good at catalyzing the mixing of people from various age-groups; as the Estival organizer says, “Young and old people mix really well in the workshops and that is great! They are helping each other in the workshops. This is very interesting as they try to create a community there. Everyone is valued and respecting” (Estival, site-visit interview, 2018). Similarly, in the L Burro i L Gueiteiro festival the significance of interaction between various age groups is stressed; the organizers observe: “The interaction amongst the participants is something that distinguishes this festival from others because it is a very friendly festival. It is friendly because we are able to involve both kids and adults in our activities, that is, we work with age groups from the baby of months to people of 70, 80, 90 years” (L Burro i L Gueiteiro, site-visit interview, 2018). According to all the festival organizers, inter-generational mixing is a significant element in the strategic planning of their festivals, with these interactions generating various types of social capital that are increasingly missing in contemporary everyday contexts, especially in large cities.
5.2 Social utility of integrating creative tourism activities within small-scale festivals

Past research has shown that engaging in common activities in a context such as a workshop can enhance social networks and strengthen the social fabric of a community by enabling meaningful social interaction among people without imposing social boundaries (Lam et al., 2018). Perceiving an event as a place where participants and audiences internalize shared meaning through projected event symbolisms, these shared meanings can facilitate a heightened sense of community and strengthen a community’s social capital. Festival organizers in this study define the local community as comprising local residents both from the village where the festival takes place and from neighboring villages, local associations, local musicians, and children (fieldnotes from Estival, 180 Creative Camp, and L Burro i L Gueiteiro in 2018; and Encontrarte Amares in 2017). In this study, the term “community” includes all persons involved in the festival in some way, that is, the local community as described by the festival organizers and also paying (visiting) participants. The analysis presented in this section focuses on the ways in which festival organizers perceive social capital is generated within their festival.

5.2.1 Small is social. It is observed that the smallness of scale contributes to feelings of safeness, as participants who are joined by a common interest to participate in the festival are able to get to know each other over the duration of the event. As the Estival organizer says, “Being small is also a strength as people really get to know each other” (Estival, site-visit interview, 2017). “Getting to know each other” means that people within the community are forming bonds and illustrates an instance of how small-scale festivals can generate social capital by facilitating the formation of networks and increasing social cohesion (Rao, 2001). Small-scale events create tighter social networks and increase the connectedness of the local population more than mega-events (Taks et al., 2015).

One of the particularities that the smallness of the festivals promotes is the feeling of being part of a community and helping to contribute to a common good. When local residents get involved as volunteers in the event, this contributes to quality of life and increased community spirit and pride (Gibson et al., 2012), but what happens when the paying festival-goers turn into impromptu volunteers? The L Burro i L Gueiteiro festival organizer says: “Participants even offer their help voluntarily to complete the daily tasks of the festival and it is this interaction, in fact, that later translates into a very friendly and ‘familiar’ ambiance” (L Burro i L Gueiteiro, site-visit interview, 2018). In this example, participants strive to build trust with local residents by volunteering, which is a way in which social capital can be built (Rao, 2001). Participants are encouraged by the festival ambiance to move beyond individualism, engaging instead in social activities of shared meanings. These actions generated within small-scale art festivals promote the feeling of justice and co-operation among all.

5.2.2 Pride of place – local residents as art participants. Particularly in rural areas, community members may view the festival not as a money-making tourist attraction but as an enjoyable community-based event that boosts community pride and where they participate as either host or visitor, or both (De Bres and Davis, 2001). In the small-scale arts festivals in this study, festival organizers say that an important aspect is that the local community also becomes part of artistic performances. This creative integration may incorporate aspects of their lives, thoughts, and realities as the core content of the artistic productions.

For example, at Encontrarte Amares an artist integrated everyday local practices into an artistic performance by recording life at a cafeteria as an input into the work. The Encontrarte Amares organizer recounts this mixing of an artist with local residents via the festival, saying that in this specific case, “a Russian artist worked with art and community. We set a challenge for her to work and follow the whole process of the cafeteria. So, what was created was a participation and a co-creation, where the ladies shared their daily life
and also brought a presentation, on the last day of the festival, about who they are and what they do” (Encontrarte Amares site-visit interview, 2017). Through this work, a shared expression and meaning are created among cafeteria workers and the festival’s participants, an act which increases the festival’s social utility as a heightened sense of community is facilitated. This is an example of how a small-scale art festival provides an occasion when the community reifies their group identity, signaling their commitment to a common good (Rao, 2001). Building on the success of this initiative, in the 2019 edition of the festival, a resident artist ballerina will create a ballet featuring the cafeteria workers, according to the Encontrarte Amares organizer (e-mail communication, May 27, 2019).

Direct involvement of local residents as part of an artistic performance was also practiced within 180 Creative Camp; as the organizer says, “The project of the ‘100 faces’ was a project of the Camp that was to meet the population. It chose known or not so known people and the idea was to create a collaborative dynamic recorded within a documentary film that involves community, regardless of age. It’s fantastic to see the video in which the old men in the city are singing and dancing. This is extraordinary” (180 Creative Camp site-visit interview, 2018). Creating a documentary film that is seen by many outside the local community can increase the social utility of the festival by boosting the local community’s pride of place (Waterman, 1998). This project is one way in which the festival encourages social leverage, increasing community spirit and pride, promoting interactions within the layers of a host community’s social fabric, and creating shared narratives of a place.

5.2.3 Building trust. It is not always easy to engage the larger host communities as not all local residents are keen to participate in the activities offered, raising the issue of the extent to which local residents view these festivals as “their own” and a part of their community’s activities or as “outside” at a physical and psychological distance. As the Estival organizer says, “We invited five villages, but only Faia came to the festa. [For the others,] 15 kilometres is too far, it is a psychological distance” in this rural and mountainous area (Estival, site-visit interview, 2018). The 180 Creative Camp organizer also points out that it is sometimes hard to get the local community engaged as they are “distrustful” that the festival is something for them. As he says, gaining local residents’ trust is a long journey, but one that can gradually bring returns: “distrust in the first year, and in the second perhaps, but from the third year, we managed to gain a good relationship with the community. And they feel the emptiness the following week (after the festival ends)” (180 Creative Camp site-visit interview, 2018). This statement illustrates how festivals may eventually have a social utility function by facilitating the formation of networks and increasing social cohesion, but first need to reinforce ties to and within the local resident community and build trust among these residents in order to be successful.

The L Burro i L Gueteiro festival, which has been running for the last 14 years, has now also gained the trust of local residents, who relish the festival visiting their village. As the festival organizer says, “it is very pleasing to them that the festival passes through their villages [...] and local communities themselves ask the festival to pass back through their villages” (L Burro i L Gueteiro, site-visit interview, 2018). These observations and reflections indicate that planning for events with social utility requires careful and long-term communications, relationship-building, and shared trust. This relates to recent research that indicates that local communities need to be consulted regarding festival planning so that as the years pass and locals feel more included or “trustful,” they welcome the festival more, and they may even contribute ideas and suggestions and provide other input directly into the planning process (Ferreira and Duxbury, 2017). This also points to the longer-term desirability of discussing ideas about event planning and programming, and the involvement of the local community members meaningfully in the planning and delivery of the festivals, not only in terms of audience reception.
6. Conclusion

This research contributes to furthering knowledge within events literature by extending our understanding of the various roles and functions of small-scale art festivals in rural contexts, and the contributions of creative tourism activities within these festivals. Findings indicate that small-scale festivals can break down boundaries and create a liminal “safe space” for the duration of the festival that allows for experimentation through creative tourism activities such as participatory creation workshops and installations. Viewing festivals conceptually as spaces of cultural practice and community celebration, the results suggest that the spaces generated by festivals prompt participants to partake in more co-creative cultural and community-based activities than they would outside the festival space, thus contributing to the successful insertion of creative tourism products into the festivals. Simultaneously, active participation in creative tourism activities, characterized by a sense of closeness and camaraderie among participants and transcending age, race, and gender barriers increases bonding opportunities among the festival participants, thus increasing the festivals’ social utility.

Contextual dynamics facilitate or inhibit the creation of shared meaning and social capital within a small-scale art festival. Strategically planning to increase the moments where the rural/small city festival community can create social capital can be achieved in various ways. One way is through enhancing the opportunities for festival community members to interact with other groups of people that do not usually mix, including artists, local residents, children, and elderly residents. Mixing volunteers, artists, participants, and local residents who have a wide spectrum of backgrounds increase bridging and linking social capital in this setting. Offering opportunities for persons of all ages to work together and bond recognizes varying stakeholder needs for both current and future generations, thus contributing to decreasing social division between individuals and groups and increasing equity and interaction. It is observed that the festival community internalizes shared meaning through projected event symbolisms, and these shared meanings facilitate a heightened sense of community and strengthen a community’s social capital by including residents in the performances and giving value to their perspectives and cultural interpretations.

This research shows that small-scale art festivals in rural areas or small cities need to reinforce ties within the local community and build trust among local residents in order to be successful. Our findings indicate that this process is built on and nurtured through careful and long-term communications, relationship-building, and shared trust between local community residents and the festival organizers, as well as the behaviors and relationships occurring among visiting artists and other festival participants as they engage with one another and with local residents in respectful manners. Over time, the dynamics and activities brought forward through these small-scale festivals have a positive psychological value for the local communities, encouraging them to see their everyday spaces “with a different eye,” highlighting appreciation and intrinsic values of local natural assets and cultural traditions, and leading to a “virtuous cycle” by which local residents look forward to the festivals visiting and residing in their villages/small towns into the future.

While it is beyond the scope of this paper, it would be interesting to focus future research on investigating whether the local communities feel the festival is imposed on them or if they are involved in the planning and implementation processes. In the past, the enjoyment and participation of the local community was typically the key driver of locally developed events, but with tourism becoming a growing element of such initiatives, there is some criticism that festivals are often imposed on communities, such as in the case of Kangaroo Island Surf Festival which created opposition from community members who felt they had not been consulted in the event planning stage (Higgins-Desbiolles, 2018). This reflects broader tourism research that points to effective local resident engagement in tourism planning as a key factor necessary for enhancing destination community social capital.
Exploring the power dynamics between a festival and the local community is an exceedingly interesting and under-researched topic (Dredge and Jamal, 2015) and following this avenue of research would help provide a more critical deconstruction of the political and economic structures that shape tourism events’ policy and planning.

The limitations of this study, which focuses on the perspectives and insights of the festival organizers and site-visit observations, must be acknowledged. An analysis of the creative tourists’ (participants) views, local community stakeholder analysis and community impact analyses would offer further insights into small-scale festivals as a development framework for creative tourism and the ways in which community engagement is fostered and achieved. These are research items being investigated as part of the ongoing investigation within CREATOUR. As well, since willingness to return to events is influenced by the creation of *communitas* within a festival (Jahn et al., 2018), other future research might usefully examine the festival communities’ perceptions of *communitas* created within such small-scale art festivals with a creative tourism component, and question if this ultimately influenced their choice of on-site activities and workshops and their intentions to return in future years.

At a more macro level, the future of the rural is a critical issue and this research offers some suggestions of ways in which organizers of small-scale art festivals can contribute to local cultural vibrancy and strengthen the social and cultural fabric of rural communities and small cities. Small-scale art festivals can provide platforms for interactive, creative experiences with local residents and can act as points for creating positive images and understandings of rural realities. The inclusion of creative tourism activities as an integral component of these small-scale rural festivals can provide focal points for extended interaction among visiting and resident participants and promotion of local rural cultural values and traditions important to its identity, thus promoting the cultural integrity of the communities where the festivals take place and their cohesiveness and pride. Consequently, these organized occasions can have a strategic and profound effect on making the world – and travel experiences within it – more meaningful, connected, and sustainable.

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**References**


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Abstract

Purpose – The purpose of this paper is to understand how festival quality, satisfaction and intention to return among cannabis festival attendees were interrelated by using the 2018 Mile High 420 Cannabis Festival in Denver, Colorado, USA.

Design/methodology/approach – This study employed an online survey with festival attendees to the 2018 Mile High 420 Festival. A total of 664 attendees participated in the survey.

Findings – Findings of the study revealed the demographic profile of cannabis festival attendees (i.e. relatively young, single and evenly distributed in terms of gender and residency) and its relationships with respondents’ perceived festival qualities. In addition, two dimensions of festival quality unique to the context of marijuana festival influenced attendees’ satisfaction and intent to return significantly. Festival attendees’ travel characteristics were used to describe attendees’ satisfaction and intent to return to a different degree. This research has also highlighted a lack of research in the area of cannabis events/festivals.

Originality/value – This study is the first investigation that studied a cannabis-themed festival in the tourism literature. As legalization of recreational cannabis has been embraced in the USA and abroad (i.e. Canada), the findings of this empirical study will help the industry professionals and policy makers to understand this unprecedented SIT market and can be used as the benchmarks for their legal and operational practicality. Further, this study highlights research gaps in the tourism literature, and identifies those areas where future study is unlikely to provide new knowledge.

Keywords Satisfaction, Cannabis tourism, Cannabis festival, Festival quality, Special interest tourism

Paper type Research paper

Introduction

In January 2019, Colorado celebrated the fifth anniversary of the first legal recreational cannabis sale in the USA. Colorado voters approved Amendment 64, decriminalizing adult possession of cannabis and establishing a regulated market and licensed commercial cannabis distribution system in 2012 (The Denver Channel, 2018). Since January 2014, when sales started, Colorado cannabis businesses have sold more than $6bn worth of cannabis and related products with $1.55bn in sales in 2018. Collections for sales tax and other revenues for fees and licensing broke the billion dollar threshold in 2019 (Rubino, 2019). These threshold levels are expected to be exceeded quickly as the global cannabis market is forecasted to grow at a 34.6 percent Compound Annual Growth Rate and reach $66.3bn by 2025 (Grand View Research, 2019).

In the past five years, cannabis tourism has emerged as a fast-growing segment of special interest tourism (SIT). SIT is defined as “traveling with the primary motivation of practicing or enjoying a special interest. This can include unusual hobbies, activities, themes, or destinations, which tend to attract niche markets” (Smith et al., 2010, p. 9). Douglas et al. (2001, p. 3) describe SIT as an alternative to mass tourism focusing on activities which attract a small number of highly dedicated visitors. SIT emerged in the 1980s and early 1990s as an alternative to mass tourism (Trauer, 2006). SIT can be used to attract tourists to destinations with limited natural or cultural resources through the use of man-made attractions including casino tourism, film tourism and shopping tourism. The hospitality and tourism industry have embraced this emerging market by offering diverse products and experience packages (Kang and Lee, 2018;
Kang et al., 2016). According to a survey conducted by the Colorado Tourism Office (CTO) in 2016, out of 82.4m travelers to Colorado, 12m (or approximately 15 percent) of those travelers participated in cannabis-related activities. Among that group, it was reported that 5 percent traveled to the state because of cannabis accessibility and activities (Colorado Tourism Office, 2017).

Cannabis tourism is defined as travel to experience recreational or medicinal cannabis consumption and its links to the local lifestyle. The boundaries of cannabis tourism also encompass attendance at cannabis festivals. Cannabis festivals often occur on or around April 20, a reference to what is considered the time the first organized cannabis consumption event occurred. The 420 events were popular with cannabis users for years in the USA even prior to legalization. Like major cities in the USA, Denver, Colorado has hosted a cannabis festival, in this case, the Mile High 420 Festival (hereafter 420 Festival), on April 20 every year. Unlike other cannabis-themed festivals, which are mainly ad hoc, without permission of, nor regulation by, authorities, the 420 Festival is a permitted and city-approved festival (Miller et al., in press). Diverse types of vendors including both cannabis related and non-related and performers have attended the festival to support the event in recent occasions. Despite the fact that the 420 Festival is a single-day event and that any cannabis-related marketing or promotion of consumption is strictly forbidden on site, the 420 Festival still attracted approximately 100,000 of visitors in 2018 (Miller et al., in press). The 420 Festival unquestionably contributes to visitation by out-of-state tourists to Colorado for the purpose of recreational cannabis consumption and, thereby, to increased tax revenues. However, there have been no research studies empirically investigating a cannabis-themed festival. Therefore, this study’s main purpose was to understand cannabis-festival goers’ perceptions on festival quality, satisfaction and intention to return at the 2018 Mile High 420 Cannabis Festival in Denver, Colorado, USA.

**Literature review**

*Festival tourism and festival quality*

Festivals are themed, public celebrations that are of limited duration and are commonly community based (Getz, 1997; Liu et al., 2019). As a growing number of communities develop and host festivals as a catalyst for local economic development (Lopez and Leenders, 2019; Getz, 2010; Gursoy et al., 2006) and social cohesion within communities (Rao, 2001), festivals have rapidly been expanding in numbers, popularity and diversity (Collins and Potoglou, 2019; Getz, 1993; Liu et al., 2019; Thrane, 2002). Festivals contribute to destinations in various ways including: strengthening a destination’s image by being associated with destination names (e.g. Edinburgh International Festival, New Orleans Mardi Gras); bringing tax dollars to communities from visitors’ expenditures (Crompton and McKay, 1997; Felsenstein and Fleischer, 2003; Kim et al., 2002; Lee et al., 2008); enhancing local pride, recreational opportunities and community cohesion (Baker and Draper, 2013; Long and Perdue, 1990; Rao, 2001); and promoting sustainable development by facilitating the learning of unique cultural heritages, community backgrounds and local customs (McKercher et al., 2006).

These festivals also provide a wide range of experiences that is different from or broader than day-to-day living. As a consequence, they have appealed to both out of region visitors and the local residents (Belk, 1975; Getz, 2010). Despite being an amalgam of tangible elements such as food, beverages and physical goods sold or given away, festivals are considered a service offering in that they consist of intangible experiences of specific duration taking place within a temporary and managed environment (Baker and Crompton, 2000; O’Neill et al., 1999). Festivals attract audiences for a variety of reasons depending on the nature of festivals (Bowen and Daniels, 2005). Some visitors are attracted by program-related features that include signage, business booths, free gifts, activities, exhibits and
printed programs and schedules. Others are more enticed by amenity features such as foods and beverages, places to sit, restrooms, accessibility and overall cleanliness. Live music, art performances and other visual experiences are other entertainment features (Tian-Cole and Chancellor, 2009; Yuan and Jang, 2008) that may appeal to certain segments. Baker and Draper (2013) investigated the importance of festival attributes and its performance satisfaction by using an importance-performance analysis at a cultural festival. Findings of the study reported that a number of significant differences were found on importance of the festival attributes based on respondents’ demographic variables including gender, ethnicity, household income and zip code.

Due to the growing competition among festivals, festival marketers are facing increasing difficulty in convincing potential visitors to choose their specific festival over an increasing number of alternatives (Lopez and Leenders, 2019; Mair and Whitford, 2013; Pike and Ryan, 2004). Since a festival’s long-term survival is increasingly recognized as being dependent on the quality of its offerings, there is widespread acceptance of the need to measure quality (Childress and Crompton, 1997). Despite the critical concept of quality that serves as a key contributor to value, satisfaction and behavioral intention (Baker and Crompton, 2000; Cronin et al., 2000; Petrick, 2004), no research has examined the relationships among quality, value, satisfaction and loyalty within the context of a cannabis festival (Kang et al., 2016).

From the quality attributes developed by Crompton and Love (1995), Baker and Crompton (2000) later framed four dimensions of festival quality: generic features (festival characteristics); specific entertainment features; information sources (e.g. printed programs and information booths); and comfort amenities for festival visitors. Cannabis festivals incorporate the above qualities with a specific focus on cannabis consumption and lifestyle and as such, have a unique synergy between cannabis, special events and SIT activities.

While many festival studies have focused on visitor motivations (e.g. Baker and Draper, 2013; Chang and Yuan, 2011; Mair and Whitford, 2013; Monterrubio, 2019; Vinnicombe, 2017), merely understanding visitor motives is insufficient to guarantee visitor satisfaction and loyalty; the comprehension of motives also needs to be factored into building attractive festival qualities and understanding festival visitor behaviors (e.g. satisfaction and loyalty) (Yoon et al., 2010).

**Festival quality, satisfaction and intention to return**

As the body of festival literature has drawn more attention to the understanding of what encourages individuals to attend festivals (Chang et al., 2014; Getz, 2010; Monterrubio, 2019; Nicholson and Pearce, 2001), research interest has been extended to festival quality, value, satisfaction and loyalty or behavioral intentions (e.g. Baker and Crompton, 2000; Lee et al., 2007; Monterrubio, 2019; Song et al., 2014; Tian-Cole and Chancellor, 2009; Yoon et al., 2010), which are recognized as important research topics.

Baker and Crompton (2000) examined relationships among festival quality, satisfaction and behavioral intentions using their four dimensions of festival quality at an annual community festival. Their findings reported that quality was positively related to both satisfaction and repeat-visit intentions. They also concluded that information sources and comfort amenities of festival quality dimensions were hygiene factors or a basic set of conditions and that generic features and entertainment features strongly predicted behavioral intention. Tian-Cole and Chancellor (2009) also investigated the impacts of a downtown festival’s attributes (programs, amenities and entertainment quality) on visitors’ overall experience, their levels of satisfaction and intentions to return. The findings of the study concluded that entertainment quality (i.e. live entertainment, bands and visual appearance of downtown) had the strongest impact on visitors’ overall experience, their satisfaction and intentions to return. Within the wine festival context, Yuan and Jang (2008) investigated the relationships between wine products, wineries and customer behavioral intentions toward a winery. Their results showed that the evaluation of festival quality was
positively related to satisfaction with the festival, and in turn exerted a positive and direct impact on awareness of local wines and wineries. The importance of perceived service quality as the strongest predictor of behavioral intention was reported by Lee et al.’s (2007) study at the Cajun Catfish Festival in Conroe, Texas.

The term, festivalscape, is used to describe the physical environment, which consists of tangible factors and the event atmosphere. The dimensions of festivalscape, like a servicescape, are usually defined independently but are perceived by customers as a holistic pattern of interdependent stimuli (Bitner, 1992). It thus refers to the way participants perceive the festival, both with functional and affective keys (Babin et al., 1994). Lee et al. (2008) empirically tested “festivalscape,” which represent the general atmosphere experienced by festival visitors in a cultural festival in South Korea by using seven prominent environmental dimensions that may affect festival visitors’ experience: quality of the festival event program; service quality by staff members/volunteers; quality and availability of auxiliary facilities; food quality; souvenirs; convenience and accessibility; and information availability. They discovered that three dimensions (i.e. program content, facilities and food) served as significant antecedents to festival satisfaction.

Axelsen and Swan (2010) explored how much of an influence certain festival attributes have on shaping visitors’ perceptions of the wine presented at the festival. Results show that five festival attributes were effective predictors of creating positive changes in people’s perceptions, while one attribute had a negative effect. For the differences between demographic groups, the most significant difference was observed between the younger and older attendees. In summary, one of the widely used festival quality dimensions that has empirically been tested are hygiene factors such as information and amenities including souvenirs (Crompton and Love, 1995; Baker and Crompton, 2000). From the festivalscape studies, event program, food availability and quality and availability of auxiliary facilities (e.g. restrooms) were identified as significant predictors of festival satisfaction (Axelsen and Swan, 2010; Lee et al., 2008, 2009; Tian-Cole and Chancellor, 2009; Yuan and Jang, 2008).

Purpose of the study and research questions
Festivals must be planned and managed effectively to maximize the benefits for a tourist destination in terms of image enhancement, economic spin-off and cultural enrichment. Thus, an understanding of visitor motivation, satisfaction and behavioral intention and the variables that influence them are critical success factors in this process (Schofield and Thompson, 2007). Additionally, Liu et al. (2019) concluded that aside from other stakeholders such as residents, government agencies, and business owners, tourists play key roles in sustaining festival tourism because satisfied tourists’ behaviors, such as revisits and positive word-of-mouth, contribute to fostering long-term loyalty and to supporting festival tourism. This finding is consistent with previous studies’ assertion (e.g. Chang et al., 2014; Getz, 2008; Lee et al., 2012) that understanding visitors’ motivation and behaviors is a critical element in developing and sustaining festival tourism.

From a festival/event planning and management perspective, it is also vital to determine visitor satisfaction and behavioral intention with respect to repeat visitation and to identify the factors which affect visitors’ experiential outcomes (Schofield and Thompson, 2007). In particular, festival visitor satisfaction is critical to sustaining a long-term relationship with festival-goers and earning more repeat visit business in the future.

Despite the increase in the number of cannabis festivals since legalization, little empirical research has been conducted on this SIT segment. To our knowledge, this is the first empirical study that investigated a cannabis-themed festival in the tourism literature. In response to such a research gap, the purpose of the study was to understand how festival quality, satisfaction and intention to return among cannabis festival attendees were interrelated by using the 2018 420 Mile High Festival as a study setting. Thus, the present study explored the
sub-dimensions of festival quality and examined the interrelationship between festival quality, satisfaction and intention to return. Festival quality was conceptualized as a performance-based definition of the attributes offered from and controlled by a festival provider directly (Crompton and Love, 1995; Parasuraman et al., 1994). Satisfaction is the affective and psychological outcome of festival attendees’ experience, which is influenced by festival quality attributes and other extraneous factors such as mood and climate (Oliver, 1997; Yoon et al., 2010). Intention to return was conceptualized as the immediate antecedent of actual visit behavior, because people tends to exercise their intention when there is an opportunity (Ajzen, 2002). Exploratory in nature, this study presents two research questions:

RQ1. To investigate which festival quality attributes were the most effective predictors of satisfaction and intention to return within the context of cannabis festival.

RQ2. To examine whether respondent perceptions varied based on their demographic and travel characteristics.

Method

Study site and Mile High 420 Festival

In 2012, the states of Colorado and Washington became the first states to legalize recreational cannabis sale and consumption in US history (Hudak, 2014). While recreational consumption is legal for individuals over the age of 21 at private properties, cannabis products are prohibited in public places, including both privately-owned public spaces like restaurants and bars and publicly-owned spaces such as parks and public right-of-ways (Kang et al., 2016). While public-space consumption of cannabis products remains illegal in Colorado, the City of Denver has allowed a festival dedicated to the celebration of cannabis to occur each year at Denver’s Civic Center Park on April 20. The first organized festival in Denver happened in 1993 when about a dozen advocates for the legalization of marijuana gathered at Denver’s Civic Center Park to stage a “4/20 Rally” in support of their agenda. As a single-day event, the festival is officially named as the 420 Festival and is known as the “largest free 420 gathering on earth.” In 2018, the Festival attracted approximately 100,000 attendees with peak attendance occurring near 4.20 p.m. (Miller et al., in press).

Enhancing the quality of the perceived experience as well as to providing economic and social contributions to the local economy have been significant driving forces behind such events and festivals (Bakers and Draper, 2013). While the accurate economic or social impacts of the festival need to be further investigated, it is inevitable to conclude that the 420 Festival plays an important role in attracting a significant volume of visitation among those enjoying cannabis consumption around the country (Miller et al., in press). According to the CTO, an estimated 6.5m out-of-state tourists visited to Colorado because of legal marijuana in 2016 (Spalding, 2018). Moreover, that number was expected to grow by 6 percent in 2017. Consequently, the total sales of recreational marijuana significantly increased by over 300 percent from $303m in 2014 to more than $1bn in 2018 (Marijuana Sales, 2019). As a result, marijuana tourism has grown 51 percent since 2014 based on a report from the Colorado’s department of revenue (Kovacevich, 2018).

Marketing a cannabis festival in Denver is much more strictly regulated than would be the case for more traditional events, even those whose focus is alcohol consumption (i.e. wine and beer festivals) (Yuan et al., 2005). Little actual traditional marketing and promotion was done. One print advertisement appeared in a local alternative weekly newspaper and there was a website for the festival, but the primary marketing channel was word-of-mouth. Two local radio stations were festival sponsors and marketed the festival on their stations. The City of Denver monitored the marketing materials for the 2018 420 Festival and occasionally required changes in wording and format, especially where the wording might be considered to be encouraging the consumption of marijuana (Miller et al., in press).
The 420 Festival is a free event with no age restriction on entry and features “beer gardens” where attendees of legal drinking age can purchase beer and wine during the festival hours. Also, a variety of vendors from cannabis-related businesses set up booths to promote their products and services. The 420 Festival also featured performances by musicians and DJs as part of the festival program (Mitchell, 2018). Due to the nature of the festival, a security firm was hired to ensure the safety and security of the attendees for the festival (Miller et al., in press). No cannabis dispensary logos were allowed to be displayed on banners or signs at the festival. Logos for companies that sell products containing the main psychoactive ingredient, tetrahydrocannabinol (THC), were also forbidden in marketing materials for the festival, both on the internet and in print. This logo ban created problems in obtaining sponsorship for the festival, a traditional method of generating revenue at typical events. While some companies were happy to be associated with marijuana, they felt the fact they could not display their logo on banners or printed material like bags would limit the return on their investment and chose not to participate (Miller et al., in press).

Measurement
Drawing upon the aforementioned festival studies, the present study adopted five dimensions of festival quality: information service, program, souvenirs, food and facilities (Baker and Crompton, 2000; Lee et al., 2008, 2009). Considering the fact that festival attributes are multifaceted (Crompton and Love, 1995), five quality dimensions were measured with 17 multi-items (see Table II). Additionally, a single item scale for visitor satisfaction (e.g. Overall, I am satisfied with the festival) and three-item scale for intention to return (e.g. I will return to the 420 Festival in Denver next time) were adapted from Oliver (1997) and Zeithaml et al. (1996). All these items were assessed with a five-point Likert scale, ranging from strongly agree (5) to strongly disagree (1) (Churchill, 1979). A series of demographic characteristics including age, gender, education, marital status, occupancy, income, ethnicity and residency and visit characteristics such as previous visit experience and information source used were asked. Five local attendees from previous festivals were asked to participate in a pilot test to fine-tune the survey questionnaire. Any ambiguous wording and unclear contexts were revised accordingly based on their comments. Finally, two tourism scholars who have expertise in cannabis tourism reviewed the final version of the questionnaire.

Data collection
An online survey was conducted between September and October 2018 with festival visitors who had attended the 2018 Mile High 420 Festival in Denver, Colorado. Due to its uniqueness of the 420 Festival as a city approved cannabis-themed festival in the one of the first states legalizing recreational cannabis consumption, the survey participants were asked about their perceptions about the 420 Festival experience only. An e-mail soliciting survey participation was delivered to 11,000 attendees, whose e-mail address were obtained from the 420 Festival organizer. Two weeks later, a follow-up e-mail was sent out to encourage more participation. Only those who indicated that they had attended the festival in 2018 were invited to complete the survey. As an incentive, several hotel vouchers and wine festival vouchers were distributed through a random drawing. Of 11,000 e-mails sent out, 991 respondents participated in the study with a response rate of 9.1 percent. After the data refinement process, 664 questionnaires were coded and analyzed for this study.

Data analysis
The following data analysis procedures were employed for this study. First, descriptive statistics were calculated to profile the sample and the constructs included in the study. Second, to identify underlying dimensions of festival quality and intention to return constructs, a
Principal component analysis (PCA) with a varimax rotation was applied to 17 festival quality items and to three intention to return items, respectively. A second round of PCA with the same set of procedure was performed after ‘cleaning’ the unsatisfactory items. Individual variables with a factor loading over 0.4 and factors with eigenvalues greater than 1 were retained. Each factor was examined using a Cronbach’s \( \alpha \) coefficient to evaluate the reliability of each factor. The factor scores were saved and used as composite scores in the ensuing analyses. Third, a series of regression analyses were carried out to delineate the relationships between the factors emerged on festival quality and intention to return construct and a satisfaction variable. Lastly, a series of analysis of variance (ANOVA) was used to test any significant differences on festival quality dimensions based on respondents’ demographic characteristics, previous visitation and information source used for the 420 Festival.

Results

Respondent characteristics

The gender ratio of the respondents was almost evenly distributed with 46.7 percent of respondents being male and 53.3 percent being female. Slightly more non-Colorado residents (58.9 percent) participated in the survey. The main age category of respondents was in the 21–30 years old (46.1 percent), followed by 31–40 (34.8 percent) and 41–50 (13.0 percent), reflecting that the 420 Festival attracted relatively young visitors. This finding may also explain why respondents were more likely to be single (58.3 percent) than married (26.1 percent). Education levels were mostly in the two-year or bachelor’s degree bracket (54.6 percent), followed by high school or equivalent degree (31.5 percent). As for ethnicity, a majority of respondents was White/Caucasians (45.9 percent), followed by Black/African–Americans (26.4 percent) and Hispanics (16.3 percent). When asked about their annual income, more than half of the respondents (61.5 percent) reported mostly under $50,000.

Nearly two-thirds of the respondents (64.9 percent) were employed for wages, followed by those reporting self-employment (15.5 percent). Only 5 percent of respondents were employed in the cannabis industry at the time of the survey. Slightly more than half of the respondents (57.7 percent) was repeated visitors with one or two previous experience(s), while 42.3 percent were first-time attendees to the 420 Festival. Regarding the information source used for the 420 Festival, over the half of respondents (60.2 percent) used the internet, followed by social media (40.1 percent), word-of-mouth (37.0 percent) and past experience (24.5 percent) (Table I).

Table II presents a summary of descriptive analyses of the 17 festival quality items, a single item for overall satisfaction and three intention to return variables. Overall, attendees were satisfied with most festival quality evaluations, with relatively strong agreements on the hospitality of the staff, live entertainment, ambience and atmosphere and safety and security provided. On the other hand, availability of sit down and rest areas, availability and cleanliness of restrooms, police enforcement and easy access to the festival site were rated low. Furthermore, it appears that the respondents’ overall satisfaction was relatively high with a mean score of 4.17 and the agreement with their intention to return statements were all strong with a range of 4.51 and 4.56, indicating a significant intent to attend the 420 Festival in the future and to deliver positive word-of-mouth about the 420 Festival.

Results of PCA on festival quality and intention to return

Table III shows the results of PCA on festival quality and intention to return. As for the festival quality construct, both Kaiser–Meyer–Olkin (KMO) (0.921) and Barlett’s test of sphericity \( (\chi^2 = 4,247.18) \) were satisfactory in performing the PCA. Results of the analysis generated two factors, accounting for 62.08 percent of the total variance explained and exceeding the minimum reliability coefficients of 0.70 recommended by Nunnally and Bernstein (1994).

The first factor was labeled as “festival program/ambiance,” which explained 39.53 percent of the total variance with a reliability coefficient of 0.92. The items included in this
Demographic variables ($n = 664$)  

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<tr>
<td>Some college/vocational AD</td>
<td>185</td>
<td>27.9</td>
</tr>
<tr>
<td>4-year college or higher</td>
<td>177</td>
<td>26.7</td>
</tr>
<tr>
<td>Graduate</td>
<td>57</td>
<td>8.6</td>
</tr>
<tr>
<td>Other</td>
<td>36</td>
<td>5.4</td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Indian/Alaskan native</td>
<td>18</td>
<td>2.7</td>
</tr>
<tr>
<td>Asian/Pacific Islander</td>
<td>8</td>
<td>1.2</td>
</tr>
<tr>
<td>Black/African American</td>
<td>175</td>
<td>26.4</td>
</tr>
<tr>
<td>Hispanic</td>
<td>108</td>
<td>16.3</td>
</tr>
<tr>
<td>White/Caucasian</td>
<td>305</td>
<td>45.9</td>
</tr>
<tr>
<td><strong>Annual income</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than $20k</td>
<td>81</td>
<td>12.2</td>
</tr>
<tr>
<td>$20–34.9k</td>
<td>137</td>
<td>25.2</td>
</tr>
<tr>
<td>$35–49.9k</td>
<td>160</td>
<td>24.1</td>
</tr>
<tr>
<td>$50–74.9k</td>
<td>122</td>
<td>18.4</td>
</tr>
<tr>
<td>$75–99.9k</td>
<td>68</td>
<td>10.2</td>
</tr>
<tr>
<td>Over $100k</td>
<td>68</td>
<td>9.9</td>
</tr>
<tr>
<td><strong>Employment status</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed for wages</td>
<td>431</td>
<td>64.9</td>
</tr>
<tr>
<td>Self-employed</td>
<td>103</td>
<td>15.5</td>
</tr>
<tr>
<td>Out of work, looking for work</td>
<td>18</td>
<td>2.7</td>
</tr>
<tr>
<td>Out of work, not looking</td>
<td>4</td>
<td>0.6</td>
</tr>
<tr>
<td>Homemaker</td>
<td>18</td>
<td>2.7</td>
</tr>
<tr>
<td>Student</td>
<td>42</td>
<td>6.3</td>
</tr>
<tr>
<td>Military</td>
<td>3</td>
<td>0.5</td>
</tr>
<tr>
<td>Retired</td>
<td>15</td>
<td>2.3</td>
</tr>
<tr>
<td>Unable to work</td>
<td>16</td>
<td>2.4</td>
</tr>
</tbody>
</table>

Table I. Respondents’ demographic and trip characteristics (continued)
factor were an overall program, live entertainment, ambiance and atmosphere, unique and
different experiences, other attendees, value for money and time, variety of vendors and
variety and quality of food and beer. The second factor was named “hygiene attribute,”
which accounted for 22.55 percent of the total variance with a reliability coefficient of 0.85.
The exemplary items in this factor were availability and cleanliness of restrooms, police enforcement, sit down and rest areas and safety and security.

Additionally, three intention to return items were factor analyzed. Results of the factor analysis showed satisfactory values of KMO (0.85) and Bartlett’s test of sphericity ($\chi^2 = 3,040.23$, $p < 0.001$) in performing the PCA. A single dimension of intention to return construct emerged, accounting for 90.65 percent of the total variance explained and exceeded the minimum reliability coefficient recommended with 0.95.

Results of regression analyses between festival quality dimensions, satisfaction and intention to return

The results of the regression analyses between festival quality dimensions, satisfaction and intention to return are presented in Table IV. In assessing festival attendees’ satisfaction and repeat visitation, both festival quality factors significantly predicted satisfaction, to a varying degree and also explained a significant proportion of variance in satisfaction construct ($F = 533.01$, $p < 0.001$, adjusted $R^2 = 0.62$) and in intention to return construct ($F = 325.46$, $p < 0.001$, adjusted $R^2 = 0.50$). Specifically, the first factor, festival program/ambiance, showed
a significant prediction power on satisfaction. The stronger the respondent’s agreement on festival program/ambiance, the more likely they were satisfied with their attendance at the 420 Festival. Furthermore, the festival program/ambiance factor exerted a stronger influence on intention to return than the hygiene attribute factor, indicating that if attendees were satisfied with festival program/ambiance, they were more likely to be satisfied with and were more likely to return to the 420 Festival in the future.

Results of ANOVA between festival quality and demographic and travel characteristics
A series of ANOVA was employed to profile respondents’ demographic and festival visitation characteristics (see Table V). Results of the ANOVA show that respondents’ festival quality perceptions were not significantly different based on their age, gender, education, marital status and occupation. However, their perceptions varied by different income categories and ethnicity significantly: the respondents with higher income were less likely to be satisfied with both festival quality dimensions ($F = 2.30, p < 0.05$ for festival program/ambiance and $F = 2.80, p < 0.05$ for festival program/ambiance). Black/African American respondents, as well as Asian/pacific islanders, reported a higher satisfaction on festival program/ambiance factor ($F = 9.70, p < 0.001$).

As for the information sources used, those who used the internet and past experience, indicated higher satisfaction on hygiene attribute factor that non-users ($F = 3.22, p < 0.01$ for the internet; $F = 2.73, p < 0.01$ for past experience), while social media, advertisement and word-of-mouth users did not show any significant difference. Alternatively, respondents who used the festival organizer’s information sources were more satisfied with the festival program/ambiance factor than non-users ($F = 5.32, p < 0.05$). Additionally, first-time attendees were more satisfied with the hygiene attribute than repeat visitors ($F = 2.25, p < 0.05$). When compared between Colorado residents and non-Colorado residents, the first dimension, festival program/ambiance factor, showed a significant difference between two groups ($F = 26.20, p < 0.001$): non-Colorado residents reported a higher satisfaction with the festival program/ambiance factor than Colorado residents, which could also be related to respondents’ first timer and repeat visit status.


discussions and conclusion
This study is the first investigation that used a cannabis-themed festival in the tourism literature. As legalization of recreational cannabis has spread in the USA, it is an opportune time to examine how the cannabis legalization has affected and changed this SIT market.

Findings of the study described the demographic profile of cannabis festival attendees; respondents were relatively young, single, evenly distributed in terms of gender and residency (i.e. Colorado residents vs out-of-state residents). Also, the study’s findings generated two

---

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Festival program/ambience $F$-value ($p$-value)</th>
<th>Hygiene attribute $F$-value ($p$-value)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Income</td>
<td>2.30 (0.044)*</td>
<td>2.80 (0.016)*</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>9.70 (0.000)***</td>
<td>1.28 (0.271)</td>
</tr>
<tr>
<td>Info. source</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet</td>
<td>2.55 (0.110)\textsuperscript{vi}</td>
<td>3.22 (0.073)\textsuperscript{vii}</td>
</tr>
<tr>
<td>Past experience</td>
<td>0.09 (0.766)\textsuperscript{vi}</td>
<td>2.73 (0.099)\textsuperscript{vii}</td>
</tr>
<tr>
<td>Information from organizer</td>
<td>5.32 (0.021)*</td>
<td>2.07 (0.151)\textsuperscript{v}</td>
</tr>
<tr>
<td>Previous attendance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>First vs repeat attendees</td>
<td>0.07 (0.992)\textsuperscript{vi}</td>
<td>2.25 (0.042)*</td>
</tr>
<tr>
<td>Residence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colorado vs Non-Colorado</td>
<td>26.20 (0.000)\textsuperscript{iii}</td>
<td>1.43 (0.235)\textsuperscript{v}</td>
</tr>
<tr>
<td></td>
<td>CO residents ($\bar{x} = 3.93$)</td>
<td>Non-CO residents ($\bar{x} = 4.24$)</td>
</tr>
</tbody>
</table>

Notes: *$p < 0.05$; **$p < 0.001$; ***$p < 0.10$; \textsuperscript{vi}$p > 0.05$
dimensions of festival quality, which were considered to be unique in the study's setting. Unlike previous studies (e.g. Axelsen and Swan, 2010; Baker and Crompton, 2000; Lee et al., 2008; Yoon et al., 2010; Yuan and Jang, 2008), the cannabis festival quality dimensions were rather simple and dual-dimensioned. Having only two dimensions of festival quality could be ascribed to the fact that the 420 Festival is a single day event with a prohibition on any cannabis consumption and sale of recreational cannabis during the festival per the City Ordinance (Miller et al., in press). Therefore, the quality dimensions at the 420 Festival could be perceived as rather limited by its attendees. The first dimension, festival program/ambiance, can be interpreted to be festival specific, encompassing most services offered at the festival, which is consistent with what the extant literature has reported (e.g. Lee et al., 2007; Tian-Cole and Chancellor, 2009). This finding confirms that each festival uniquely generates its own quality characteristics and dimension based on their main theme or product offerings. The second dimension, named as hygiene attribute, was also reported in other festival or event settings (e.g. Baker and Crompton, 2000), emphasizing a basic set of conditions associated with comfort amenities of festival quality. Overall, satisfaction with the festival quality items was reported with the highest marks on the hospitality of the staff, live entertainment, ambience and atmosphere and safety and security.

Furthermore, the two dimensions of festival quality emerged exerted significant influences on attendees' overall satisfaction and intention to return. This finding supports what has been reported in the tourism literature, concluding that a cannabis-themed festival could be easily understood as another SIT segment in terms of relationships among quality, satisfaction and loyalty. Between two dimensions, festival program/ambiance factor was a stronger predictor of satisfaction and intention to return, which were also consistent with other studies in different festival settings (Bowen and Daniels, 2005; Tian-Cole and Chancellor, 2009; Yuan and Jang, 2008).

This study also examined the relationships among respondents' demographic, visit characteristics and perceived festival quality. Among other demographic variables, income and ethnicity were significantly different on satisfaction vis-a-vis two quality dimensions. The younger attendees were more likely to be satisfied with both quality dimensions and African-Americans or Asian/Pacific-islanders were more likely to be satisfied with the festival program/ambiance factor. These findings are a new addition to the festival tourism literature as the most frequently reported socio-demographic variables in differentiating visitors' perceptions at various festivals have been age (e.g. Axelsen and Swan, 2010; Reisinger and Mavondo, 2004) and gender (Reisinger and Mavondo, 2004).

Furthermore, two festival quality dimensions were significantly different based on the information source reported by the respondents. Interestingly, those who used the internet and past experience were more likely to be satisfied with the hygiene attribute. The importance of past experience as the information source can be interpreted as they were familiar with the setting (i.e. the public park in the middle of Denver) and were likely to hold more realistic expectations about the venue and the festival itself. On the other hand, those who gathered the festival related information from the organizer were more satisfied with the festival program/ambiance. This finding may be due to the fact that the organizer's website was one of a few places where potential visitors could view program content, entertainment information, etc., because the cannabis festivals are not often publicly promoted or communicated about due to the illegal status of cannabis at the federal level and stigmas attached to it (Kang et al., 2016). Even though it was a city-approved festival, the destination tourism organizations like the City of Denver or CTO refused to promote it as a city event. Most promotion and advertising efforts were usually through word-of-mouth or social media by the festival permit holder and the festival organizer who was contracted out to organize the 420 Festival. Also, non-Colorado residents' higher satisfaction with festival program/ambiance can be explained by the fact that they were more likely to be first-timers, which
exhibit a novelty effect. The first-time travelers’ or visitors’ higher satisfaction has been frequently reported in the tourism literature (e.g. Kruger and Saayman, 2017; Lee et al., 2009; Shankk and Taylor, 2004).

As a new type of SIT that has emerged rapidly in the past five years in the USA, cannabis festivals will generate various questions and issues surrounding cannabis tourism, which concern major tourism stakeholders, such as visitors, residents, tourism authorities, hospitality sectors and governments. With very scarce research on the topic in the tourism literature, the study’s finding can lead healthy and productive conversations among different stakeholders in Colorado. For example, SIT visitors are known to spend more, stay longer, travel more frequently and participate in more activities than other tourists (Keefe, 2002; MacKay et al., 2002). If the City of Denver is keen on developing this SIT festival as sustainable and profitable, which can contribute to generate more tourism revenues, findings of the study can serve as helpful resource that will render significant and practical values. Such knowledge and data will only increase in importance as marijuana tourism continues to evolve as a SIT segment (Kang et al., 2016).

**Limitations and future studies**

As exploratory in nature, this study did not test causal relationships among quality, satisfaction and intention to return. The positive effect of satisfaction on intention to return has been widely supported in the literature of marketing and hospitality and tourism disciplines (e.g. Fornell et al., 1996; Lee et al., 2007; McDougall and Levesque, 2000; Oliver, 1997). However, several studies (e.g. Mason and Paggiaro, 2012; Yuan and Jang, 2008) reported that the quality of the festival appears not to directly affect intention to return but has an indirect effect through satisfaction. Thus, future studies can employ a theory-based and a more rigorous approach by using a causal or path analysis to detect more dynamic relationships among the three constructs included in this study.

The current study’s finding could be enriched with the findings from qualitative data. Because each festival can demonstrate its own quality characteristics and dimensions based on their main theme or product offerings, the findings from a qualitative study could detect more valid festival attributes that might influence quality dimensions at a cannabis-themed festival. Since cannabis festivals are widely organized throughout the USA, it is important to investigate more than one setting or location. Emotions also have been used as a significant mediating variable influencing overall satisfaction in examining festivalscape in the tourism literature (Mason and Paggiaro, 2012). It was reported that visitors’ emotions and satisfaction should be monitored by festival organizers to maximize visitors’ intention to return (Mason and Paggiaro, 2012). Therefore, the future study may incorporate an “emotion” construct into an empirical model to understand this niche market fully. Adding an “emotion” dimension into the testing model would be more interesting and beneficial within the context of cannabis tourism market because cannabis had been an illegal drug until recently. Therefore, some people may still feel guilty about consuming cannabis due to its historical and legal background and may associate legalization and festival celebration as more emotionally evoked than other types of tourism products or festivals.

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Bridging the divide
Framing an industry-academia collaborative research agenda for cycling sport tourism events

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Abstract

Purpose – In sport tourism, an undeniable recent participation trend is the gravitation of amateur athletes to participatory sport events, particularly cycling sport tourism events. This trend presents numerous policy, applied, and scholarly opportunities and challenges. Contemporary trends are identified to guide future research addressing cycling sport tourism events. The paper aims to discuss these issues.

Design/methodology/approach – This is a collaborative initiative between a major global sport event management organisation and established sport tourism scholars. Industry data are drawn upon to identify contemporary sport event participation trends and thus inform a future research agenda.

Findings – This paper draws upon industry data and insights to tease out five emerging trends in the participatory sport event sector which scholars should engage with.

Research limitations/implications – Due to the confidential nature of the company data, there were restrictions in the detail which could be reported.

Practical implications – Increasing growth in premium quality, physically challenging cycling sport tourism events is analysed. A five-pronged future research agenda is proposed to address contemporary sport event management issues around measuring event impacts; strategic management of events; and leveraging globalisation and emerging markets.

Originality/value – Based on trends identified in this paper, theoretical concepts are drawn upon to propose a timely, industry-relevant future research agenda into cycling sport tourism events.

Keywords Event management, Serious leisure, Amateur athletes, Cycling events, Industry-academia collaboration, Social worlds

Paper type Research paper

Introduction

Increasingly, neoliberal imperatives within modern universities are encouraging researchers to engage more closely with external stakeholders relevant to their discipline (Ball, 2012). In this sense some governments keenly point out a responsibility of the academy to contribute to solving topical problems and responding to contemporary trends in contrast to exclusive concerns with abstract theory testing and development (Universities Australia, 2018). Consequently, across the spectrum of academic disciplines and within strategic vision documents published by a multitude of universities globally, there have been calls for greater collaboration between industry and academia (Ankrah and Al-Tabbaa, 2015). This paper is a direct response for heightened collaboration between industry practitioners and scholars to better understand emerging trends and industry-relevant future research themes within the context of participatory sports events.

Participation among amateur athletes competing in sport events has grown significantly over the past decade, particularly in competitive endurance sports such as distance running,
triathlon and cycling (Lamont and Kennelly, 2012; Shipway and Holloway, 2016; Shipway et al., 2016). Demand for, and supply of participatory sport events continues to flourish in many countries. It is estimated that in 2016 there was growth of 13 per cent per annum in marathon running events in the USA and significant increases in markets such as China, Russia and the Philippines (Shipway and Holloway, 2016). This growth is replicated in the sport of triathlon where the largest global brand, Ironman, will stage an estimated 298 branded events globally in 2018 including 41 full Ironman distance events, and 156 events over half the designated Ironman distance (Ironman, 2019). In 2015, there were over 4,300 registered and sanctioned triathlons in the USA and there has been recent growth across Asian and South American markets including Peru, Chile, Argentina and Ecuador (Runtri.com, 2018). However, the emphasis of this positioning paper is specifically on cycling sport tourism events catering for amateur cyclists, and their potential future shaping of active sport tourism markets.

Flowing from the recent proliferation of demand for and supply of participatory sport events, the focus of this paper is the emerging cycling sport tourism events segment (e.g. Buning and Gibson, 2016a, b; Lamont, 2014b; Shipway et al., 2016). In doing so, we draw upon industry data and insights gleaned through collaboration with a major global sport event management organisation which runs an increasingly popular model of cycling sport tourism events known as Haute Route™. Haute Route events provide opportunities for amateur cyclists to experience quasi-professional, multi-day cycling events modelled off professional cycling stage race events. Haute Route events are typically staged in places imbued with cycling significance such as the mountainous routes commonly traversed by global cycling mega-events including the Tour de France and Giro d’Italia. Thus Haute Route events are extremely physically challenging and are marketed as appealing to those seeking a lofty sense of physical achievement. They also offer shorter format events that cater for cycling tourists who value the safety and social dimensions of their events. In Green and Jones (2005) proposed the term “serious sport tourism” to describe travel to participate in serious leisure pursuits; the cycling sport tourism events addressed in this paper epitomise serious sport tourism.

This paper is timely and significant as it addresses a contemporary and strong trend in active sport tourism participation: significantly growing demand for challenge-driven cycling event experiences. We do not intend this paper to be a traditional scholarly piece. Rather, we seek to leverage industry knowledge for the dual purposes of enhancing applied practice and advancing theoretical understandings of event sport tourism participation. Drawing upon a variety of in-house data, we present insights into Haute Route participant demographics, motivations, economic benefits for host destinations. We then conclude by exploring five emergent trends within the broader cycling sport tourism events segment, enfolding these industry insights into scholarly literature to propose a future research agenda for cycling sport tourism events capable of mutually benefiting both industry and academic imperatives.

Cycling sport tourism events
The focus of this paper is “road cycling” of which the primary event-based sub-disciplines span road racing, time trials and circuit-based criterium races. However, it is the proliferation of organised cycling events with entrenched values of participation and personal challenge over competition (Berridge, 2014), which is at the core of this paper. Known under an umbrella of varying semantic terms, these participatory events are referred to as “Gran Fondos” (a term of Italian origin, meaning “big ride”), “sportives” in the UK, and “cyclosportives” in France. However, there are some specific differences that are discussed below.

In this discussion, the term “Gran Fondo” is used for simplicity and consistency, to encompass one-day cycling events for amateurs with some element of competition and timing. Gran Fondos have become very popular in the last 10–15 years, particularly in
Europe, North America and Australia. These events take a multitude of forms, however, they usually share similar core characteristics. In terms of distance, Gran Fondos normally allow participants to ride a specific course with others. This normally involves three different distances (e.g. Long: 100 miles/160 km, Medium: 60 miles/100 km, and Short: 30 miles/50 km). In relation to duration, the majority of events are single day, however, several are multi-day ranging from two to three days up to two to three weeks, for more extreme events.

With regards to timing, first, some events are fully timed and participants ranked, akin to a race where there is competition and prizes linked to results. Participants may either benefit from a road/lane closure, a priority of way or some other form of traffic management. Second, some events are partially timed and ranked during specific segments. This is more common where the cost is prohibitive to close a road or a lane, or where timing may encourage dangerous cycling, such timing steep descents or segments involving busy roads. Third, some events publish riders’ times, but do not provide a ranking and are listed only by surname, hence it is more difficult for riders to compare their times. Finally, other events are non-competitive and are untimed and unranked, with participants concentrating more on social and fun elements or completing the event, rather than speed. In terms of support, some events are fully supported whereby participants have access to several refreshment points supplying food and drink; mechanical support; medical support in case of accident or emergency; and both volunteer and marshal support along the road for controlling traffic. Some events are partially supported which may have some but not all of the support listed above, whilst other events are non-supported, thus participants must be fully self-sufficient for the duration of event.

The earliest Gran Fondo events were not races per se, instead they were marketed as opportunities for large groups of riders to cycle en mass through places made famous by professional events such as the Tour de France, Giro d’Italia, Vuelta á España or one day “Classics” such as Paris-Roubaix, the Tour of Flanders or Liege-Bastogne-Liege. Perhaps the oldest event of this type is La Marmotte, first staged in 1982 (Berridge, 2014). This event takes place in the French Alps over the same course each year, and includes four famous Tour de France mountain climbs. La Marmotte is regularly oversubscribed for the 7,000 annual entries. The Cape Town Cycle Tour, more widely recognised as the Cape Argus, claims to be the largest timed cycling event in the world and in 2018, its 40th year, attracted nearly 40,000 riders from around the globe. The continued growth in cycling sport tourism events has been significant in the last decade with additional globally acknowledged large events including Ride London (established 2013), with nearly 80,000 participants over one weekend of festivities, formed in 2013 and Gran Fondo New York (established 2011). For example, Gran Fondo New York (2018) lists over 200 events in the USA; however the majority of smaller local and regional events are not advertised nationally.

The cycling sport tourism event market has also experienced recent expansion in South and Central America and Asia, partially replicating trends within distance running and triathlon, with new events emerging in Mexico, Taiwan, China, Japan and Chile (Haute Route, 2017). In the UK, cycling participation has grown rapidly and British Cycling, the sport’s governing body, shows a licensed membership growth from 50,000 in 2012 to over 125,000 in late 2016 (British Cycling, 2018). L’Etape du Tour, one of the most famous Gran Fondos was first run in 1993. In 2017 it listed 72 nationalities amongst its 15,000 participants. Similarly, Haute Route cycling events have hosted cyclists from over 50 different nations since their inception. A selection of high profile single and multiday Gran Fondos is summarised as follows:

Single and multiday cycling sport tourism events:

1. Single day events:
   - L’Etape du Tour: formed in 1993, with 15,000 riders per year. Owned by Amaury Sport Organisation (ASO) and now licensed around the world in 14 destinations.
La Marmotte: formed in 1982, 7,000 riders per year. This is a series of three events including La Marmotte Pyrenees and La Marmotte Valais in Switzerland.

Wiggle Sportives: a series of 76 events across the UK with a more relaxed and low key format.

Gran Fondo New York: one of the largest and most prestigious events in North America launched in 2012 and with nearly 5,000 participants. This is now being licensed globally, with 15 planned events in 2018.

Ride London: the UK’s largest event, launched in 2013, with over 80,000 participants over the weekend of varying lengths.

Cape Town Cycle Tour: the largest timed cycle event in the world, currently in its 40th year, with nearly 40,000 participants.

(2) Multi-day events:

- Haute Route: formed in 2011, this multi-day series of seven-day and three-day events features 11 locations for 2018, in France, Italy, Norway and the USA.

- Hot Chillee: formed in 2004, it has four three to four day events in 2018 in the UK, France, Italy, Morocco and South Africa.

Cycling sport tourism events are, arguably, significant catalysts for tourism, with large numbers of amateur cyclists reported as travelling to participate in cycle sport tourism events. For example, L’Etape du Tour attracts approximately 15,000 participants annually, whilst the Paris-Roubaix Challenge attracted 4,500 participants in 2016 from 45 different countries, with 37 per cent being British, 16 per cent Dutch and 11 per cent being French. In contrast, whilst Haute Route events had over 2,000 riders completing an event in 2017, only 19 per cent lived in the host country, indicating that 81 per cent of participants travelled abroad to compete, with 27 per cent travelling from a different continent (Haute Route, 2017). The sport tourism development implications of these travel patterns and the potential for future market developments are clearly encouraging for host destinations.

Research which has examined participation in cycling sport tourism events have suggested such events can be perceived by amateur cyclists as spaces of sporting significance which promote a sense of collective belonging (Brown et al., 2015; Fullagar and Pavlidis, 2012). Previous academic work has identified that riding through iconic cycling spaces, such as the mountainous roads of the Tour de France, cycling tourists may experience feelings of existential authenticity and develop more empathetic and embodied connections with the feats of their sporting heroes within places imbued with touristic significance within the social world of cyclists (Lamont and McKay, 2012; Palmer, 2010). Lee et al. (2016) have suggested that active engagement with the eventscape through co-created experiences are various, value rich and personal. The concept of constructive authenticity (Wang, 1999) has relevance in explaining the authenticity projected onto toured objects by tourists or tourism producers in terms of imagery, beliefs, preferences or expectations. For example, a cyclist might be exposed to mediated representations of a cycling place by watching one of cycling’s “Grand Tours” (e.g. Tour de France, Giro d’Italia) on television or through reading cycling magazines. In doing so, they construct mental images and preconceived expectations of those places, and thus the authenticity of a place is therefore subjectively constructed by the individual. For example, one of the Tour De France’s most renowned mountain climbs, l’Alpe d’Huez, may be perceived as an authentic cycling place due to its perceived difficulty and by virtue of the sporting feats that have played out on the mountain since its inception in 1952 (Wynn, 2018). Consequently, visiting that place then affords cycling tourists co-presence with the site where the individual’s mental images of that place are reconciled with reality. The cycling sport tourism literature suggests that
embodying these places through the kinesthetic act of cycling can heighten feelings of constructive authenticity felt by the participant towards the toured place/object (Lamont, 2014a).

Having outlined the background context and various forms of cycling sport tourism events, we now turn attention to reviewing the growth of such events, with particular emphasis on the Haute Route series of events.

**Haute route™ cycling events**

Haute Route events, conceived in 2010, aim to provide amateur cyclists with an experience of being a quasi-professional cyclist riding a multiday stage race through some of the most challenging and iconic cycling terrain in the world. Although not explicitly marketed as races (nor officially sanctioned as racing events by cycling’s governing body, the Union Cycliste Internationale (UCI)), Haute Route events are both timed, ranked, and prizes are awarded for those riders topping their categories. They are fully supported events and seek to mimic the experience afforded to professional cyclists undertaking multi-day stage races, through features such as the daily depart village and post-stage massages. As such, amateur cyclists pay a premium participation fee to facilitate employment of medical staff, security, police, safety, and refreshment personnel, as well as hundreds of volunteers and marshals along the course. Each event normally attracts between 300 and 600 riders from all over the world (Haute Route, 2018).

The inaugural event, a seven-day event across the French Alps from Geneva to Nice in 2011, was followed by the addition of other seven-day events in the Pyrenees (2013), the Dolomites and Swiss Alps (2014) and the Colorado Rockies (2016). Shorter three-day format events based in one location proved popular and events in 2018 included eight different locations including Asheville, San Francisco and Cedar City (USA), Bormio and Fredazzo (Italy), Bedoin and l’Alpe D’Huez (France) and Stavanger (Norway). New events in Oman and Mexico, respectively, were added to the event calendar for 2019. The strategic aim of the organisation is to continue this expansion given evidential increasing international demand for cycling sport tourism events among serious amateur cyclists.

The seven-day events cover a total distance of between 500 and 600 miles (800–960 km), with participants usually cycling from point to point each day, climbing approximately 20 “cols” (long and high mountain passes), and travelling a distance of 70–90 miles (112–144 km) each day. A typical Haute Route event consists of five mountainous stages including one “queen” stage, the most difficult stage characterised by a gruelling distance and/or significant elevation gains, and one individual time-trial. The three-day events usually cover a total distance of between 150 and 200 miles (240–320 km), with participants based in one specific location for the duration of the event. Cyclists will usually climb five to six cols over the three days, travel a distance of 70–90 miles (112–144 km) each day, and these events normally consist of two mountain stages and one time-trial. Consequently, a defining characteristic of Haute Route events is their extremely physically challenging nature; completing a Haute Route event is a significant mark of athletic achievement for amateur cyclists. The events provide participants with the accumulation of knowledge, behaviours and skills that help to demonstrate their own cultural competence and social status or standing within the cycling social world (Bourdieu, 1984; Shipway et al., 2013).

On average, participants pay an entry fee of around £1,200–£1,500 (US$1,550–$1,930) for the seven-day events and £500–£700 (approximately US$640–$890) for the three-day events (Haute Route, 2017). Entry fees do not include accommodation and participants either choose to purchase accommodation via the event organiser, via a tour operator (who adds additional services to the event including accommodation, massage, physiotherapist and bike mechanics), or they arrange accommodation themselves. As such cycling sport tourism events such as Haute Route have commodified cycling sport tourism experiences. They fit the
criteria identified by Beedie and Hudson (2003) that facilitates this commodification: a deferring of control to experts; a proliferation of promotional media; and the application of technology in sport and adventure tourism settings. Event organisers, like Haute Route, are able to provide packaged experiences that reduce the burden on participants who are themselves no longer required to fully research destinations, cycling routes, accommodation, access to food, or how to overcome cultural, logistical and language challenges.

Data sources
The information presented in the ensuing sub-sections is the product of post-event surveys administered to Haute Route event participants, analysis of data gleaned from event participant entry databases, and strategic market analysis conducted by Haute Route organisers (Haute Route, 2017). It should be noted that due to the confidential nature of the company data, there were restrictions in the detail which could be reported. The authorship team of this paper consisted of three authors: two academics widely published in sport tourism studies, while the lead author was a senior strategic director of Haute Route Events. The two academic authors were not able to access the raw data nor participant entry databases, though were given access, on a strictly confidential basis, to a precis document of the data which were collected and analysed between 2011 and 2017 (Haute Route, 2017). The post-event surveys were designed to explore Haute Route event participants’ reasons for participating, visitation characteristics, and expenditure patterns. These post-event evaluative surveys were primarily intended to facilitate enhanced event delivery based on participants’ feedback, and also to obtain information regarding participants’ demographic characteristics to aid organisational marketing and sponsorship procurement functions.

The questionnaire was developed internally by the Haute Route organisation, without academic input, and refined over time based on internal organisational requirements. Survey data collected included expenditure estimates, demographic information, cycling participation and behaviour characteristics, motivations for participating in Haute Route events, and satisfaction with various elements of the Haute Route event offerings. The surveys also invited open-ended feedback on the participants’ event experiences. Each Haute Route participant received an e-mail invitation to complete the survey online after their respective event. Insights presented within this paper are drawn upon survey data from every Haute Route event between 2011 and 2017 (total 19 events) and have historically yielded an average response rate of approximately 37 per cent. Survey data were analysed in-house by Haute Route staff, who performed descriptive analysis by exporting the electronically collected data from the web survey platform into Microsoft Excel. As the Haute Route staff who conducted the analysis were not trained in advanced statistics, analysis was restricted to basic univariate descriptive statistics on the individual variables. The precis document also contained strategic market analysis conducted internally by Haute Route staff in relation to their key competitors and broader external business environment (Haute Route, 2017).

The information gleaned through such surveys allows a glimpse into the target market characteristics of Haute Route event participants, though this data does contain inherent limitations. For example, the relatively low average response rate limits generalisability of the findings. Moreover, exploring event participants’ motivations for participating in Haute Route events is based on arbitrary measures as opposed to being grounded within suitable human motivation theory. Additionally, the economic impact analysis conducted by Haute Route may not have factored in important requisites for producing accurate tourism-induced economic impact estimates as advocated by Crompton et al. (2001) such as excluding responses from local residents and time switchers, along with ascertaining travel party size.
Upon examination of the precis document, the three authors met multiple times face-to-face and online to discuss the survey data and strategic market analysis outcomes. During these discussions, the two academic authors sought to iteratively clarify with the senior Haute Route director, the broader implications of the survey data combined with Haute Route’s strategic market insights (Haute Route, 2017). From these discussions, five emerging trends pertaining to cycling sport tourism events were distilled, which are discussed in the ensuing sections of this paper. Additionally, the two academic authors met several times to discuss how the practitioner data and market insights linked with the scholarly literature discussing sport tourism participation and management. It is through these theoretically focussed discussions and iterative consultation with the relevant literature that the five trends were arrived at, and our industry-relevant future research agenda for cycling sport tourism events was formulated (refer to Table I).

As highlighted above, event management organisations typically lack internal capacity to collect data befitting of publishable academic standards; nevertheless, post-event surveys are crucial for event management organisations in garnering feedback from participants and aligning future event offerings with demand-side expectations (Allen et al., 2002). An area where industry-academia collaboration in the participatory sport event space can make a substantial contribution is in assisting industry practitioners to collect rigorous data. Doing so may not only help inform more effective product development, but also in examining emerging participation trends. Despite the limitations that can belie industry data, this information may be useful in indentifying germaine future research avenues that are of value to practitioners and scholars alike.

Demographic overview of haute route event participants
Close to 10,000 participants will have completed an Haute Route in either the seven or three-day format by the end of 2018 (Haute Route, 2018). Registration data indicates that the gender distribution for participants is 88 per cent male and 12 per cent female. Over 50 nationalities are represented. The top nationalities are the UK (28 per cent), France (12 per cent), USA (7 per cent), Canada (7 per cent), Australia (7 per cent), Switzerland (5 per cent), Brazil (4 per cent) and Mexico (4 per cent). The fastest growing markets are Brazil, Taiwan and Mexico. Haute Route participants average approximately 5,000 miles (8,000 km) on their bikes each year, and 55 per cent of the riders return to complete more than one Haute Route event. The average age of participants is 44 and their mean annual income was approximately £120,000 (US$152,000). Further, 15 per cent of respondents earned more than £250,000 per annum (Haute Route, 2017), suggesting Haute Route participants are predominately from higher socioeconomic backgrounds.

The majority of riders in either the seven-day or three-day format travel from outside their home country to participate in Haute Route events. This figure stood at 78 per cent in 2017, and is consistent across both formats. In 2017, over one quarter (27 per cent) of the cyclists travelled to a different continent to participate in Haute Route events, of which 35 per cent travelled to a different continent for the seven-day events vs 13 per cent for the three-day formats. Approximately 50 per cent of riders were first time participants in a seven-day Haute Route in 2017, whereas nearly two-thirds of riders, 64 per cent, were participating in the three-day Haute Route for the first time (Haute Route, 2017).

Contemporary trends in cycling sport tourism events
Based on Haute Route organisers’ observations across their portfolio of cycling events, we suggest that there are five emerging trends within the cycling sport tourism events market that may present a range of applied and academic opportunities and challenges in coming years. These trends include: the potential for mobile event modalities to yield enhanced economic impacts for host destinations; heterogeneity in cycling sport tourism event
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<td>Globalisation and emerging geographic markets</td>
<td>What are the key drivers of demand for cycling sport tourism events in emerging geographic (developing) markets? How do event management organisations decide whether to enter new geographic markets?</td>
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Table I. Cycling sport tourism events trends and research themes (continued)
participants; marginal increases in women’s participation, despite a still significant gender divide in cycling event participation; increasing demand for new places and innovative event concepts; and the impact of globalisation and emerging geographic markets. Table I summarises the five identified trends along with suggesting topical future research questions and theoretical concepts pertinent to each trend. The ensuing sub-sections unpack each trend in detail along with associated future research opportunities.

Trend 1: mobile event modalities and their economic contribution to host destinations
Host cities, regions or communities can benefit via direct economic expenditure associated with cycling sport tourism events and potential repeat visitation by event participants. (Bull, 2006; Bull and Lovell, 2007). Haute Route cyclists and their supporting entourage such as family members and friends, along with event personnel, all contribute to host destination economies through purchasing accommodation, food, drinks, souvenirs and cycling-related goods. Importantly though, cycling sport tourism events such as Haute Route are distinct from many other sport tourism events by their mobile nature. That is, the event, its participants and entourage, along with associated infrastructure move from one host community to another on an almost daily basis. This is in contrast to many other sport tourism events which feature a central locality for the event’s duration. The mobile nature of Haute Route events therefore raises some important questions with regard to the disbursement of economic impacts across geographic space.

Economic impact estimates conducted by Haute Route organisers on both seven-day and three-day Haute Route events in 2016 and 2017 show the following results. Each seven-day event has both a start and finish location where participants arrive either a few days prior to the event or stay a few days afterwards. Previous Haute Route start and finish locations have included Geneva (Switzerland), Nice (France), Anglet (France), Toulouse (France), Innsbruck (Austria), Venice (Italy), Boulder (USA) and Colorado Springs (USA). Moreover, each seven-day event passes through several cities or towns which serve as stage start and/or finish points. Participants typically stay one night in each of these locations, thus assisting with dispersing the economic benefits of Haute Route events across a wide area as opposed to concentrating new expenditure in one particular location. Additionally, Haute

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<td>models for entering new geographic markets (franchising, licensing, in-house expansion)?</td>
<td>How do the event management organisations cater to this increasing calendar? How do they make decisions around resource allocation, ensuring adequate levels of staffing given their pulsating workforce requirements?</td>
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<td>What role does brand identification play in amateur cyclists’ event participation decisions?</td>
<td>How does the growing calendar influence the way amateur cyclists manage their leisure time in preparing for/participating in events?</td>
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Route stage start/finish towns are typically smaller towns with a high dependence on winter-based tourism. As such, it is plausible that cycling sport tourism events can assist with addressing the seasonality challenges faced by destinations (e.g. Pegg et al., 2012).

Following on from the discussion above, the timing of Haute Route events is also significant and directly related to each event’s economic impact potential, especially considering the issue of tourism seasonality. The actual timing of each individual event is subject to a wide variety of variables such as gaining regulatory approval from relevant authorities in each host community along with availability of a critical mass of suitable accommodation capable of housing each event’s mobile entourage. However, Haute Route does endeavour to time each individual event strategically, so as to maximise an event’s economic benefits to its host communities. This is achieved through staging events during shoulder seasons when demand and tourism services and infrastructure is much lower than peak season. Indeed, earlier writings on sport tourism events advocate strategic timing of events as a useful means of optimising economic benefits for small-scale events (e.g. Daniels and Norman, 2003; Walo et al., 1996). Further, hosting cycling sport tourism events during shoulder seasons can provide significant economic benefits to host regions that are heavily dependent upon winter-based tourism, such as alpine regions. However, given that cycling is an outdoor sport heavily influenced by climatic conditions, it is essential to strike a balance between staging events at times when demand on tourism services and infrastructure is not at its peak, weighed against staging an event during times of year when climatic conditions are favourable for cycling. To overlook this consideration may prove commercially imprudent as potential participants may be discouraged from entering an event if prevailing climatic conditions (e.g. snow, icy roads) at that time of year a likely to produce dangerous and/or uncomfortable cycling conditions.

The estimated daily direct economic impact for each seven-day host location is £220,000 (US$284,400) (Haute Route, 2017). Similarly, the three-day event format is based around one location, and this allows participants to stay in the same hotel for several nights, whereby family and friends also tend to join the trip. The estimated daily direct economic impact for each 3-day host venue is £360,000 (US$465,400) (Haute Route, 2017). The economic impact estimates calculated by Haute Route is the product of commercial in confidence data collection from post-event surveys administered to event participants. However, there are inherit limitations with the rigour of the economic impact measurements adopted to date, and the practitioner figures presented here must be viewed with extreme caution. As such, there is a clear need for research applying more and robust measures and economic modelling capable of accurately measuring the economic value of cycling sport tourism events, whilst also meeting publishable academic standards.

Relatedly, Haute Route events tend to take place outside of major metropolitan centres where road conditions and terrain are more conducive to safe and enjoyable cycling tourism experiences (Ritchie and Hall, 1999). Tourism has long been touted as an effective component of broader economic development strategies for regional areas because of its ability to generate income and employment by virtue of existing infrastructure and endowed resources (Butler et al., 1997; Giaoutzi and Nijkamp, 2005). Daniels and Norman (2003) argue that participatory sport events feature attributes such as utilisation of existing infrastructure and low need for public funds, enhancing their ability to deliver favourable economic benefits to host destinations. While there is a great deal of previous research examining the economic impacts of sport tourism events(1), the economic contributions of mobile sport tourism events in regional areas, such as Haute Route, are much less well-understood. Future research should therefore unpack questions such as how do mobile event modalities assist with disbursing economic impacts across wider geographic areas? How do the economic impact of mobile cycling sport tourism events compare to other kinds of sport tourism events?
However, economic impacts are but one element of the triple bottom line approach to sustainability (Hacking and Guthrie, 2008). Further, event scholars are rightly casting a more critical eye on the impacts of a wide range of events on host communities (e.g. Collins et al., 2009). In addition to better understanding economic impacts, future research addressing the social and environmental impacts of cycling sport tourism events is warranted, as this is an aspect of sport tourism research that has not received a great deal of attention to date. Thus, one future research question is:

**RQ1.** Do mobile event modalities invoke fewer social and environmental impacts on host destinations, particularly given that such events tend to have a shorter duration within concentrated geographical places?

Future research could also explore the social exchange value to host community stakeholder groups of hosting cycling sport tourism events.

**Trend 2: heterogeneity in cycling sport tourism event participants**

Evidence gleaned from Haute Route data suggests that participants are heterogeneous in terms of their demographics, cycling practices and motivations for participating in Haute Route events. Similar heterogeneity in cycling event participants has been observed in previous research (Lamont and Jenkins, 2013). Given that the cycling sport tourism event demand market is diverse, this heterogeneity presents both challenges and opportunities for event management organisations in terms of maintaining strategic competitiveness within the supply market, but also in meeting demand-side expectations.

Data collected through Haute Route post-event surveys suggest there may be distinct segments of participants who vary in their reasons for participating. Within the post-event surveys Haute Route participants were asked to indicate the degree to which they identify with a closed list of reasons for participating in Haute Route events. From this analysis it was evident that pockets of participants strongly endorsed reasons relating to competitiveness and performance achievements compared to others; others strongly endorsed reasons around social opportunities and camaraderie, although they were less attracted by competitiveness reasons; and there were also significant numbers of respondents who endorsed completion and exploration reasons far above competitiveness and performance reasons. Taken together, this data suggests that Haute Route event participants are far from homogenous in their reasons for taking part.

However, from an academic perspective, rigorous segmentation of the population of Haute Route participants based on the organisers’ internal data are problematic. This analysis relied upon Haute Route’s in-house survey methodology, with measures for participation motives being arbitrary and not grounded within any underpinning theory. Given this inherent limitation, there is a need for additional research adopting more rigorous foundations for segmentation of participants in cycling sport tourism events that would benefit event organisers and enhance theoretical understandings of event tourism participation. Lamont and Jenkins (2013) have pointed out shortcomings inherent within event segmentation studies, calling for more theoretically informed research.

Previous segmentation studies conducted in the context of sports events have largely discounted individual participant’s levels of experience, skill, knowledge, and physical ability and affect relating to the activity in which participants are engaged (e.g. running, cycling and swimming). Such studies […] have thus arguably failed to adequately link the demand dimensions of events (e.g. participants’ needs, skills, motivations, and experiences) with supply dimensions (e.g. event setting, accessibility and facilities). This situation may be particularly problematic for events where factors such as physical ability, commitment to the activity, experience, skills, and knowledge can influence the quality of an event participant’s experience (pp. 391-392).
Market segmentation is widely advocated as a useful marketing tool enabling purveyors of products or services to more accurately tailor offerings to supply-side characteristics. Segmentation is advocated as necessary due to a prevailing assumption that consumers are not homogenous and therefore have differing needs which must be accommodated in product or service offerings (Dolnicar, 2002). Segmentation specifically refers to “dividing a market into distinct groups of buyers with different needs, characteristics or behavior that might require separate products or marketing mixes” (Kotler et al., 2007, p. 344). Theoretical concepts such as recreation specialisation (Bryan, 1977) and enduring involvement (Laurent and Kapferer, 1985) have been advocated as multidimensional concepts suitable for tapping nuances amongst participants in active leisure practices, particularly cycling (Chen and Chen, 2012; Lamont and Jenkins, 2013; Ritchie et al., 2010).

We therefore suggest future research should examine heterogeneity amongst cycling sport tourism event participants using theoretical concepts such as recreation specialisation and enduring involvement. These concepts may be deployed in exploring questions such as how and on what basis do cycling sport tourism event participants vary? What variables explain the greatest variance in heterogeneity amongst cycling sport tourism event participants? Addressing such questions may subsequently inform further explorations around how heterogeneity amongst event participants relates to their event preferences, as well as exploring implications heterogeneity may have for event product design. Empirically derived insights may draw attention to a need for event management organisations to offer tiered product structures and/or to develop multi-pronged product offerings if they are to gain and sustain competitive advantage in this market.

**Trend 3: (marginally) increasing women’s participation, though still a gaping gender divide**

Cycling sport tourism events and other amateur endurance sports events have experienced marginal growth in women’s participation recently. Insights gleaned through Haute Route data and related strategic market analysis have identified a steady increase in the proportion of women in event fields. At Haute Route seven-day events, female participation increased from 8 per cent in 2011 to 10 per cent in 2017, whilst female participation at the shorter three-day events stood at 14 per cent in 2017 (Haute Route, 2017). Haute Route organisers forecast an increase for the above time frame to approximately 15 per cent on the seven-day events and between 20 and 25 per cent for the shorter three-day events. In a related multi-day cycling sport tourism event context, the flagship event of another cycling sport tourism event organisation, Hot Chillee, is the London to Paris four-day event; in 2017 females represented 13 per cent of participants. For their Cape Rouleur four-day event in South Africa, females constituted 19 per cent.

Other market insights also point to marginal increases in female participation. For example, L’Etape du Tour (discussed earlier) exhibited 5 per cent female participation in 2017, which rose from 3 per cent in 2007 and from just 1 per cent in 1997 (L’Etape du Tour, 2018). In South Africa, the Cape Argus event has seen female participation grow from 3 per cent in 1978 to 12 per cent in 1986, 17 per cent in 1996, and is currently stable at around 20 per cent female participation between 2006 and the present day (Haute Route, 2017). Ride London, the UK’s largest one-day event taking place on closed roads around London over the past five years began with women’s participation levels at 18 per cent in 2013, and has grown to a stable 24–26 per cent in recent years (Haute Route, 2017). Moreover, an increase in female participation has been observed in related participatory sport events. For example, in distance running this trend is reflected across all distances from 5 km, such as the weekly parkrun series which have a majority of female participants, compared to the more established 26.2 mile (42.2 km) marathon distance (Shipway et al., 2013).

It is arguable that the broader cycling social world has experienced a marginal shift from being exclusionary to women to more inclusive. Traditionally, media coverage of
professional cycling races has prioritised men’s events (Flottorp, 2019). However, over the past decade cycling’s global governing body, the UCI, has worked to reduce inequities between men’s and women’s professional cycling by increasing the number of and coverage of women’s professional races through initiatives such as the UCI Women’s WorldTour, and establishing a women’s advisory commission (UCI, 2018a). At a more local level, many cycling clubs now have women’s teams and committees, and cycling is (slowly) becoming a more gender-inclusive sport. As recently as ten years ago, there was limited choice for women in terms of women-specific road bicycles and cycling kit. However, today most major bicycle manufacturers offer women-specific models and all of the largest clothing manufacturers produce a women’s range. For example, Rapha, a well-known luxury cycling clothing brand, has seen its most significant growth over the last three years in its women’s ranges, with over 100 pieces (Haute Route, 2017). It is therefore reasonable to suggest that women’s participation in cycling sport tourism events will continue to increase in line with growth in other endurance sports over the coming five to ten years.

Whilst marginal growth in women’s participation reported above is promising, the reality is that a gaping divide between men’s and women’s participation in active sport tourism remains. This gender inequity was first noted 20 years ago when Gibson (1998) noted that “the overwhelming consensus is that the active sport tourist tends to be male, affluent, and well educated” (p. 56). In an introduction essay to a recent special issue of *Journal of Sport and Tourism* on active sport tourism, Gibson and her co-authors lamented that the sample descriptions of published active sport tourism studies since then suggest this gender inequity remains (Gibson *et al.*, 2018). Consequently, there is a need for future research seeking to explain and redress the significantly lower numbers of female participants in cycling sport tourism events. For example, leisure constraints and constraints negotiation theory has been advocated as a prudent theoretical foundation for understanding barriers to sport tourism participation (Hinch *et al.*, 2005). These concepts could be fruitfully deployed to better understand, and potentially dismantle, women’s constraints to participation in cycling sport tourism events. Similarly, given one of sport’s cultural functions as a traditional space for heteronormative masculinity (e.g. Messner, 1992), ethnographic work examining the playing out of gender in cycling social worlds may shed light on men’s discursive practices which may potentially discourage female participation.

Trend 4: increasing demand for new places and innovative event concepts

Increasingly, contemporary serious sport tourists are seeking out new and innovative event concepts (Hinch and Shintaro, 2018). The current market indicates a consistent number of riders competing in formal races in both the USA and the UK, but without any significant growth and that potentially many riders are looking for new challenges. More recently in the cycling event world, instead of taking part in a single day event, feedback from Haute Route cyclists is that more adventurous cyclists are seeking events lasting several days, or even one week or more. There is growth in events covering longer distances, sometimes referred to as ultra-distance cycling, traversing several countries or wide areas of remote land. Examples include the Transcontinental Race, Tour Divide and Race Across America. In terms of safety and security and perceived risks there have been notable incidents during ultra-distance cycling events including deaths, where participants push themselves to their limits over many days (Fry, 2017).

New “exotic” locations such as Sri-Lanka, India, Colombia, Bolivia and Brazil are emerging within the cycling sport tourism event landscape, and Haute Route has also added Mexico to their events calendar for 2019. Sports travel operators including notable industry players such as Rapha have similarly reported consistent demand for new and exciting destinations (Haute Route, 2017). It is therefore likely that cyclists will continue to demand more endurance cycling sport tourism events that are of high quality in terms of
organisation, route, excitement, exploration and challenge, but also that allows them to participate without being either in a “mass” field of thousands of other competitors or going without support such as medical teams, refreshment points, and road marshals. We therefore suggest that cycling sport tourism event participants are generally attracted to challenging events, albeit within an environment that provides some support and is relatively “controlled”.

To contextualise the discussion above within a scholarly perspective, we suggest the concept of a “social world”, embedded within broader social theory, is an appropriate starting point (Unruh, 1979, 1980). It is important to better understand why participants are attracted to, and maintain commitment to a serious sport tourism pursuit such as endurance cycling, and to achieve this, it is instructive to understand the social world in which participants become ensconced. A social world is a concept adapted from symbolic interactionist sociology and requires conceptual modifications when applied to the context of cycling sport tourism events. Social worlds are not native to sport, tourism, event or leisure disciplines, and certainly did not emerge from the early exploratory fieldwork studies on sport tourism (Shipway and Jones, 2007, 2008). What those studies did illustrate was that the social worlds of serious sport tourists, including cyclists, are complex phenomena that require further investigation.

We suggest that what makes the social world surrounding cycling sport tourism events such as Haute Route distinct, is the central role that a perceived aura of sport heritage by cycling through iconic cycling places plays. Moreover, events such as Haute Route enable amateur cyclists to temporarily and vicariously perform as quasi-professional cyclists emulating their professional counterparts who have co-constructed epic sporting feats in the past (Lamont, 2014a). These iconic cycling routes, such as those in the French Alps, Pyrenees and Italian Dolomites, are readily accessible eventscape (Brown et al., 2015) where amateur cyclists can pursue serious sport tourism and embody the past achievements of their professional idols, as a central part of their identification with the activity of cycling. Events such as Haute Route plausibly allow amateur cyclists to symbolically follow in the wheels of their sporting idols, and through enacting the core activity of cycling on iconic routes and courses, they become better placed to appreciate the prowess and abilities of the professional athletes. As such, the practice of cycling becomes more than just a passive hobby (Stebbins, 2014), and their social identity is projected and collectively celebrated against a backdrop of place venerated as iconic within the cycling social world (Shipway et al., 2016). As such, we advocate future qualitative studies that explore cycling sport tourism events replicating the stage race model of professional cycling through catering for serious, amateur cyclists. Such research would deliver enhanced understandings of the lived experiences of cycling sport tourism event participants and better explain their motives for participating in such events.

Indeed, for many Haute Route participants the notion of “collecting” places, and relatedly, collecting event experiences is, arguably, a central motive (Shipway et al., 2016). We suggest that through these event experiences, amateur cyclists may become more knowledgeable about the social worlds and circumstances through which they acquire valuable and cherished experiences (Shipway and Jones, 2007), and develop a more sophisticated appreciation of the significance of each cycling sport tourism event. We therefore suggest additional research is required to better understand the extent to which amateur cyclists seek to “collect” challenging cycling sport tourism event completions as achievement markers within their social world. Another pressing question is if and how accumulating a portfolio of event completions yields cultural capital which fortifies the participants’ standing within their social world?

Trend 5: the impact of globalisation and emerging geographic markets
Haute Route participation data reveals increasing diversity in cyclists’ countries of origin. Moreover, there is increasing demand for Haute Route events from cyclists residing in
countries where cycling has not been a traditionally mainstream sport such as Brazil, Taiwan and Mexico. Thus Haute Route organisers believe emerging markets such as Central and South America as well as parts of Asia, principally Singapore, Taiwan, Japan, the Philippines and China could drive significant development in the coming years for the cycling sport tourism event market. This growth in emerging markets is reflective of a broader initiative by the UCI to globalise cycling participation from grass-roots levels through to elite, reducing the sport’s traditional Euro-centricity (UCI, 2018b).

In response to increasing demand within emerging markets, event organisers are seeking to leverage this increased demand by expanding their operations into those countries to initiate new events. Event management organisations staging cycling sport tourism events have increasingly been observed executing international business expansion strategies to cater for increasing demand for Gran Fondo-style events in non-traditional cycling nations. For example, the French ASO, who organise the Tour de France and its subsidiary participatory event L’Etape du Tour, have recently begun selling licences to local event management organisations in countries such as Australia, South Africa, China, Taiwan, Korea, Mexico, Colombia and Brazil (L’Etape du Tour, 2018). Under this business model, local event managers gain the rights to stage cycling sport tourism events utilising the L’Etape du Tour branding and thus leverage the Tour de France’s brand identity. Similarly, the Gran Fondo New York, who operate exclusively on a licensing model are developing events in places such as Bali, Colombia, Costa Rica, Brazil, Indonesia, Panama and Chile (Gran Fondo New York, 2018). We suggest that this trend will continue on the multi-day, branded event model in coming years, as illustrated by Haute Route’s addition of franchises in Oman and Mexico to their 2019 events calendar.

Relatedly, the increasing globalisation of cycling is producing a crowded, year-round events calendar which creates challenges for both event management organisations and cycling sport tourism event participants. An increasingly crowded calendar could be a concern for event companies who need to carefully schedule their events with reference to the broader cycling events calendar. To not take other events into consideration means that the supply sector could risk cannibalising itself unless demand for cycling sport tourism events continues to grow exponentially.

The increasing globalisation of cycling raises challenges and questions around strategic management for event management organisations staging cycling sport tourism events. A central strategic management consideration is potential entry into new geographical markets. Such decisions must be made based on rigorous analysis of the new jurisdiction, and a suitable business model (e.g. licencing, franchising, expansion) devised to guide a new international strategy that adds value to the corporate portfolio (Johnson et al., 2015). Consequently, there is scope for industry-academic collaborative research to understand demand drivers of cycling sport tourism events in emerging cycling countries, along with business models that facilitate sustainable economic business growth. Relatedly, research examining how event management organisations manage and deploy their resources and infrastructure to service a growing, globalised calendar would be of value. For example, participatory sport events are often reliant upon volunteer labour, and the way that volunteer human resources are managed can have a significant influence on the success or otherwise of an event (Leigh et al., 2013). Research examining resource-related issues may assist event management organisations with crafting effective functional strategies and therefore enhance the likelihood of international strategies being successful.

From a demand perspective, the growing calendar of cycling sport tourism events presents prospective participants with myriad options, creating competitive challenges for event management organisations in gaining and maintaining market share. Thus research examining participants’ event selection decision-making processes may shed light on aspects of product offerings and marketing strategies that could lead to competitive
advantage for event organisers. The growing prevalence of branded events (such as the expansion of L’Etape du Tour discussed earlier) leads to questions around the influence of brand identification in cycling social worlds, in relation to amateur cyclists’ event selection decisions.

Within the context of highly dynamic business environments, it is likely that additional market trends affecting the competitive positioning of cycling sport tourism event providers will emerge as significant in the future. For example, it could also be argued that one trend not discussed, though warranting investigation, is the impact of technology, particularly the impact of digital disruption upon cycling sport tourism events. In the digital age there could well be scope for additional research opportunities that explore whether emerging cycling-specific technologies such as the web and avatar-based indoor cycle training platform, Zwift (2018), is perceived as a threat by cycling sport tourism event organisations? Future research could explore how evolving technologies help or hinder cycling sport tourism event organisations, and whether digital technologies can enhance the experiences of cycling sport tourism event participants through interpretive mobile applications or interactive online communities.

Conclusion
The purpose of this paper was to draw upon collaborative industry-academia knowledge exchange aimed at directing future research into highly topical trends in event sport tourism. That is, exponentially growing supply and demand growth for cycling sport tourism events. This paper drew upon in-house industry data which was enfolded within relevant theoretical concepts to propose a future research agenda capable of yielding knowledge of interest to both practitioners and scholars. At face value academics may dismiss the data presented in this paper as lacking rigour; indeed throughout this process we have highlighted shortcomings in this practitioner-generated data. This included confidentiality issues surrounding the company data that restricted the level of detail we were able to report. However, in doing so at the end of each of the five main sub-sections we have identified and emphasised opportunities to conduct collaborative future research that may generate higher quality, mutually beneficial knowledge for practitioners and scholars alike.

Following a general review of the extant market for participatory sport events, this paper undertook a comprehensive review of cycling sport tourism events. Anecdotal industry evidence suggests that the growth of cycling sport tourism events will continue on several continents in the coming years. This positioning paper has also identified numerous practical implications for cycling sport tourism event organisers and potential host destinations, highlighting that both single and multiday events such as Haute Route have been successful in creating unique event settings and event designs that help disengage participants from their daily life and to increase the emotional intensity of social interactions with fellow cyclists (Lee et al., 2016). Moving forward, the emphasis should now be on event organisers and destinations to work collaboratively to further create distinctive event “stages” in host destinations (Shipway et al., 2016). What is apparent from the analysis in this paper is that the cycling sport tourism event market will remain buoyant for the foreseeable future; this clearly provides opportunities for further development of this distinct active sport tourism market.

Despite its potential value to both parties, industry-academia collaborative research can be challenging. For example, in the context of initiating industry-academia collaboration, there is a clear tension created between the need for “quick” research and results that are required by practitioners in order to keep pace with competitors and changes in demand-side preferences, weighed against the inherently relatively slow nature of academic research which privileges rigour and ethics. The important, though often time-consuming task of gaining university
ethics approval before research can begin, is a key example of such a challenge. These challenges may also be compounded by the often-bureaucratic nature of universities which may delay proceedings in cases where formal contracts between a university and a private sector organisation are required, for example, where a formal transfer of funds between the private sector organisation to the university is required to fund aspects of the research. Thus, it is crucial at an early stage that potential industry-academia research partners clearly articulate to one-another their objectives for entering the arrangement, as well as any organisational requirements that are likely to shape a project and its timeline.

Note

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The street party: pleasurable community practices and placemaking

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Abstract
Purpose – The purpose of this paper is to explore spatial and social practices associated with a community street party through the lens of literature on encounter, conviviality and placemaking, considering its role developing a place-based sense of community.

Design/methodology/approach – The research is based upon a case study of a street party in London. Data sources include interviews, a questionnaire, observation and a literature review.

Findings – The conviviality associated with partying disrupts mundane social relations and engages diverse communities in placemaking. People playfully engage with one another, performing and reinforcing community and place values in the environment outside their homes.

Practical implications – This paper aims to engender understanding and encourage urban policy makers to support activities which combine pleasure and play to develop a place-based sense of community. It identifies practices which actively engage people at a grassroots level and enable them to articulate and perform community values.

Social implications – Developing a sense of community in rapidly changing and diverse urban areas presents challenges for urban policy makers. Grassroots activities such as street parties often fall outside of funding streams, debates and formal policy making for cities but it is argued here that they enable people to engage in pleasurable and playful interaction and have an important role in disrupting mundane interactions and connecting people.

Originality/value – This paper progresses discussion of community events from a social perspective through an original study, identifying specific practices which contribute to a place-based sense of community.

Keywords Placemaking, Community, Pleasure, Event, Conviviality, Party

Paper type Research paper

Introduction
This paper extends the literature on community events and placemaking (Duffy and Mair, 2014, 2018; Sweeney et al., 2018) by considering convivial practices and experiences associated with a community-led street party. It argues that partying is an important aspect of placemaking and contributes to a shared sense of community, enabling playful experimentation with the geographies, sociabilities and everyday functionalities of a place. Its findings focus on the practices associated with the party, including making, doing and sharing, and the articulation and performance of values. This leads to a discussion around the characteristics of the party that support placemaking and contribute to a place-based sense of community. These include its location and impermanence, multiple opportunities for engagement, associations with pleasure and disruptiveness.

The study is set in a street in North London which has staged four street parties in the past decade. Street parties are not uncommon in wider area – at least three similar events have been held nearby in the past three years. These parties provide an unusual opportunity for social interaction supported by music, dancing, games, activities and shared food. This paper is developed from research into one party in 2016 and uses literature on encounter, conviviality and placemaking to explore the social and spatial practices associated with developing a place-based sense of community in a street that is socially and culturally diverse.
The street

Lynch (1960) conceptualises the street in terms of its physical form – as a linear space with a connective function providing a route, path or space through which people travel. The street also has social functions and attributes and is “a tangible place for the convergence of a multitude of histories, trajectories and expressions” (Hall, 2012, p. 130). “People of all ages and cultural backgrounds occupy the street, rub shoulders, and exchange greetings” (Georgiou, 2017, p. 267). It is “central to the life of an area” (Hall, 2012, p. 6), a neutral, shared realm, which provides a setting for everyday associations, activities and experiences (Anderson, 2011; Zukin et al., 2016). While it is shared, it is experienced in dissimilar ways by different people (Rota and Salone, 2014). Geographical proximity does not lead to people facing similar challenges in their daily lives, sharing interests or even using common amenities. In a multicultural, socially diverse street people live together but can remain apart in a state of “courteous, but distanced co-location” (Hall, 2012, p. 54). Public streets are multi-functional shared spaces that accommodate a variety of users and can be contested as different needs and aspirations compete, for example, car parking and through traffic present challenges to the street as a place for children to play.

There is a growing literature on events which temporarily close or reconfigure streets. These have multiple objectives and forms – some such as “Reclaim the Streets” (Carmo, 2012; British Library, 2017) and slut walks (Reger, 2015) highlight peoples’ rights and freedom on the streets. Others use recreational and social activity, conviviality and interaction to rework street uses and norms (Bunnell, 2008; Burrage, 2011; Faskunger, 2013; Mason et al., 2011). Examples include “Ciclovia”, “Open Street” and “Play Streets” projects which promote on-street recreational activities (D’Haese et al., 2015; Mason et al., 2011; Zieff et al., 2016) and street festivals and parties support social interaction (Duffy and Mair, 2018).

This paper focusses the temporary reconfiguration of a street to host a community street party. In the UK context street parties started in the early twentieth century and have evolved from practices of “Street Dressing” – decorating the street with flags and bunting to mark national occasions (The Street Party Site, 2019). The street party is a type of community festival that is held outside people’s homes and is usually organised for and by residents. In the past decade, street parties have proliferated, encouraged by nationwide community initiatives including “The Big Lunch” and “The Great Get Together” (Eden Project, 2019; Great Get Together, 2019). These initiatives are often associated with developing a place-based sense of community and are motivated by communitarianism – “a version of pluralism that defines collective responsibility and problem solving with a sort of DIY activism” (Rojek, 2013, p. 109). In this paper, the street is conceptualised in term of its social and physical attributes as a way to explore the implications of a party which disrupts mundane interactions and contributes to peoples’ sense of community within a residential street.

Sense of community

If “community life is sustained when social networks are strong, when there are people with common interests and who feel a sense of common fate” (Berkowitz, 1996, p. 452) it is unsurprising that there are considerable challenges in developing and sustaining a sense of community in diverse areas. Vertovec’s (2007) concept of super-diversity is relevant in the study area where there are multiple dimensions of difference, including social class, age, connection to the area, cultural background and ethnicity. In areas of super-diversity creating sense of “community” and “belonging” is an ongoing and complex process (Hoekstra and Pinkster, 2019). Allport’s (1954) contact hypothesis suggests that mundane and everyday encounters can create conviviality, enabling people to make connections and to negotiate difference and belonging (Askins, 2016; Fincher and Iveson, 2008; Gilroy, 2004; Heil, 2014).
There is a body of research into the nature of conviviality in multicultural areas (including Amin, 2008; Noble, 2013; Georgiou, 2017; Gilroy, 2004; Heil, 2014; Wessendorf, 2014) much of which draws from Sennett’s (2005) definition of civility “the capacity of people who differ to live together” (p. 1). The contention is that in areas where ethnic, cultural religious and linguistic diversity are commonplace, people demonstrate “civility towards diversity […] as a strategy to both engage with difference as well as avoid deeper contact” (Wessendorf, 2014, p. 392). Amin (2008) notes how apparently diverse public spaces can become locked into patterns of interactions “people who already know each other meet in known corners” … Their mingling … “rarely involves transgressing long-accumulated attitudes and practices towards the stranger” (pp. 9-10).

Within diverse communities regular convivial encounters with neighbours in the street can be cursory or superficial and do not necessarily create understanding, a sense of community or “a respect for difference” (Valentine, 2008, p. 323). Matejskova and Leitner argue that fleeting encounters can reinforce stereotypes, contrasting this with feelings of empathy engendered by the deeper and sustained encounters as people engage in a project. Their study points to the importance of activities or events that enable people to work together.

Much research into conviviality focusses on mundane interactions and suggests, “daily habits of quite banal intercultural interaction” (Sandercock, 2006, p. 42), facilitate dialogue and the negotiation of difference which is held to enhance the “local liveability” of neighbourhoods (Amin, 2002, p. 960). More relevant to this study is Noble (2013), who distinguishes between those “iterative processes which accumulate – and moments in which a habituated behaviour might emerge as a response to an unexpected situation” (p. 175). He illustrates one such moment that occurs as people share an experience of a performance in a school play which humorously parodies ethnic boundaries. This shifts the established conventions around discussing difference and leads to humorous exchanges across diverse groups with lasting effects.

**Sense of place**

The relationship between community and place is indeed a very powerful one in which each reinforces the identity of the other, and in which the landscape is very much an expression of communally held beliefs and values and of interpersonal involvements. (Relph, 1976, p. 34)

Places are conceptualised as “territories of meaning” (Holt-Jensen, 1999, p. 224), “social zones where meaningful representations of, and emotional connections to, people and settings can be formed” (McCunn and Gifford, 2018, p. 208). They are “fluid dynamic contexts of social interaction and memory” (Stokowsky, 2002, p. 368) which are sustained by narratives, imagery and symbols.

The term sense of place relates to peoples “ability to develop feelings of attachment to particular settings” (Stokowsky, 2002, p. 368) and the term placemaking is often used to describe the process “of transforming spaces into qualitative places” (Cilliers and Timmermans, 2014, p. 414). Placemaking is an ongoing, emergent, relational and social process of investing in spaces (Franklin and Marsden, 2015) involving collective action (Semenza, 2003). It is commonly an activity in which “people actively create meaningful places through conversation and interaction with others” (Stokowsky, 2002, p. 272) through the performance “of practices which serve to connect heterogeneous elements and draw them together into conversation, to produce and maintain a particular coherence; to make place” (Sweeney et al., 2018, p. 573). Initiatives to develop place-based community identity often rely on peoples’ engagement in a mixture of social and spatial activities including art, performance, community gardening, festivals and social events (Semenza, 2003; Semenza and March, 2009). These initiatives create new meaning through encounter and shared experience, adding another layer to peoples’ diverse experiences and identities (Hall, 2012).
Of particular interest to this paper is the literature on temporary social interventions such as festivals and events which can contribute to peoples’ place-based sense of community by disrupting mundane social practices, strengthening social ties and local identity and creating pleasurable experiences (Duffy and Mair, 2018; Gibson and Connell, 2011; Quinn, 2005; Rota and Salone, 2014; Stevens and Shin, 2014; Stevenson, 2016). Here politics and pleasure intersect (Sharpe, 2008) as people explore and perform “a different way of organizing social and political life” (p. 227) which is “plural, temporary and inclusive” (Amin, 2008, p. 17). The “positive, celebratory, and leisurely” (Sharpe, 2008, p. 227) aspects of festivals can create “symbolic solidarity” (Amin, 2008, p. 17) and have the capacity to draw people together and inspire social action. These “bursts of community” (Brent, 2009, p. 233) can be transformative at the local scale in terms of creating a sense of belonging in a place. However, their transformative potential is both localised and limited – they do not resolve problems of social inequality (Harvey, 1989; Waitt, 2008) and their effects can be temporary (Brent, 2009; Koutrolilikou, 2012; Rojek, 2013; Waitt, 2008).

Method
This paper is underpinned by a case study (Yin, 2009) of one street party and draws together interviews, questionnaire data, observations and literature to study multiple voices and perspectives of the party and its effects. Primary research was conducted before, during and just after the party and included:

- In total, 20 semi-structured interviews of between 45 and 75 min which were carried out before and after the party – 4 with residents who led and facilitated the party, 11 with residents who provided music, activities or food outside their home, 3 who attended as party-goers but were not directly involved in providing activities and two with people who did not attend. The interviews were conversational and covered definitions of the local community, sense of belonging in that community (including discussion about how many people they knew by name or recognised/greeted in the street), involvement in the party and their engagement in other community/voluntary activities.

- In total, 40 survey questionnaires completed during the party (21 by residents and 19 by visitors) in which people were asked how they were involved in the party and what they enjoyed most and least about the event.

- Observations of organisational meetings and the party.

Data analysis was informed by grounded theory (Glaser and Strauss, 1967). Consents were obtained from all participants. Interviews were transcribed, coded and themed using Nvivo and research memos were written during the analytical process to capture ideas as they emerged. Themes were developed further using the questionnaire data, observations, research memos and existing literature on community events and placemaking. Interviewees are numbered to maintain anonymity and the numbers appear after direct quotes in brackets thus (1).

The study
The study is based in Archway in the London Borough of Islington (LBI), a place that is socially and ethnically diverse and has experienced rapid population growth – increasing by 17 per cent between 2001 and 2011 and a further 13 per cent between 2011 and 2018 (UK Census Data, 2011; LBI, 2018). It is a place of contrast – mean incomes in the Borough are high – in 2014–2015 they were £56,800 compared to £31,800 in the UK (Data London, 2017) but it is also the 24th most deprived borough in the UK (LBI, 2018). This disparity is illustrated in the Ward (small electoral district in the Borough) where the study is located, and the least deprived residents live adjacent to the most deprived (LBI, 2018, p. 17). Housing tenure is mixed in the Ward – 45 per cent social housing, 34 per cent owner occupation and
20 per cent private rented (LBI, 2014) and in the street which is occupied in a mixture of tenures and forms, including family and shared houses, flats and bedsits. The street comprises 110 properties and its residents are ethnically, culturally and socially diverse — people who are affluent and those who experience deprivation live as neighbours. While there are no apparent tensions between these different people who live in close proximity, their diverse lives, practices and routines support “a civility of indifference” and mundane interactions involving polite “conviviality without engagement” (Georgiou, 2017, p. 266).

Findings

Sense of community

Interviewees identify a place-based sense of community associated with being “local” — a term that includes people who live in the street or regularly traverse it. They identify spatial characteristics including “trees” and “greenery” which provide a setting for on-street sociability (5, 7, 10 and 15). Living physically close to one another in a narrow road and terraced housing and flats supports social interaction. “The family across the road feel like your neighbours as well as the people next door so that we community a lot by just shouting across the road” (11). Interviewees identify important neighbourhood places where they can to meet and socialise. These include a church hall in the adjacent street which is used for activities including a playgroup, after-school clubs and exercise classes. Shops at the end of the street provide “places that people use but also places where they meet” (12) and the local school offers opportunities for residents with younger children to meet.

Peoples’ place-sense of community arises from “relationships with people in the street” (10) “friendships with people in the nearby area” (11) and “recognising people who regularly walk along it” (15). These relationships are often based on greetings and brief conversations but form the basis of convivial familiarity with neighbours that supports a sense of belonging and confidence in the environment around their homes. They are enhanced by common interests such as raising children, political campaigning, playing music and on-street guerrilla gardening (7, 8, 11, 18 and 19). Geographical proximity and common interests intersect creating a “densely acquired network of familiarity” (Hall, 2012, p. 129) which develops as:

[…] whatever is local becomes a part of your life […] and involves ‘getting to know your neighbours through the small things - It could just be buying your milk every day at the shops -you recognise people, they get to know you and then you have a good chat. (15)

Interviewees discuss challenges they face in developing a place-based sense of community — identifying regular turbulence as people move in and out of the area and three major shifts — one in the 1970s when large scale housing demolition severed friendship networks; in the 1990s when the area changed rapidly becoming “smarter” (16) “or gentrified” (18) as more “middle-class families moved in and refurbished houses” (3), and more recently in the early 2000s as private renting increased and it became more diverse again. This type of turbulence is not uncommon in inner cities and is associated with wider urban processes of regeneration and change that transform neighbourhood relations (Hall, 2012). In this street peoples’ sense of community is dynamic, constantly being worked as the area changes existing networks are severed and new networks are formed. The street party is one process which reworks peoples’ placed-based feeling of community.

The contribution of the party to a place-based sense of community

The party encompasses collective action to transform the street (Semenza, 2003; Semenza and March, 2009), disrupting everyday relations and creating shared experiences and memories. “It brings people together” (7), “you get to meet many of the neighbours that you might not know” (2). Relationships with neighbours change “Rather than just a faces
passing in the street they become somebody you can smile and say ‘hello’ [...] you know where they are and you can look out for each other” (7). The party “makes people feel a sense of belonging [...] a real sense of community and that neighbours share with each other” (9).

The civilities and associations arising from face-to-face interactions are important (Georgiou, 2017) and the party facilitates introductions and communication which is sustained through civil and convivial everyday exchanges:

It creates a remarkable opportunity to meet people that I haven’t met before and to break down barriers. The last ones really contributed to relationships that have been sustained by bumping into each other in the street once every few weeks, seeing each other at the local shop and so on. (11)

Figure 1 is developed from the questionnaires and includes people who attended the party but were not directly involved in its organisation. The most enjoyable aspect is getting to know other people in the street. The most commonly used words are “meeting” and “neighbours” highlighting the importance of face-to-face convivial exchanges and reflecting a shared desire to be together which resonates with the research by Brent (2009), Georgiou (2017), Hall (2012) and Semenza and March (2009). The temporary spatial transformation of the street and the community atmosphere of the party facilitate pleasurable and friendly interactions, enabling people to move beyond the courteous conviviality of everyday greetings. Similar to studies by Duffy and Mair (2014, 2018), at this party pleasurable interaction is supported as people share music, food and drink, and enables people to perform their identities in the unfolding story of the place.

Social practices at the party
Making, doing and sharing. Developing a street party is a convivial process that draws upon the diverse skills and creativity within the community. Hall (2012) and Semenza and March (2009) contend that creative expression can be a means to promote togetherness, interaction and shared experience, linking people to places. This happened as people prepared for the party within their families and with neighbours. Six women interviewees identified the importance of the shared experience of making party bunting together. An open invitation was sent to everyone in the street by flyer. In total, 12 women gathered on the evening – for
many it was the first time they were invited into this neighbour’s house – some knew each other well and others had not previously met:

It was interesting to do something like that. Culturally it is something that women used to be doing in other places and other times quite often, but we don’t have many opportunities to do that now and not with our neighbours. So, I think there’s something quite special about doing something creative together. (12)

The experience of making bunting was perceived to create a sense of community through the conversations, laughter and understanding that emerged in the practice of a shared task.

Another creative endeavour was the preparation of food to share with neighbours and was commonly mentioned by interviewees and questionnaire respondents. Cooking for the party drew together extended families and friends, providing opportunities to communicate cultural difference and traditions. For example, one interviewee whose family originate from India said:

My mum cooks samosas and […] and my workplace has got loads of tea urns. So I borrowed one of those, borrowed a trestle table and had tea and samosas. We made a really big effort to go and say hello to people. (17)

As an observer I noticed that sharing food encouraged conversation and how sharing practices gained momentum as people were offered food and drink, and in-turn became increasingly generous. As that happened, narratives about place, friendliness and sharing were strengthened and this process continued after the party as stories were recollected and retold.

Creative and sharing practices were also identified by a group of resident musicians met before the event to work out a schedule and how to develop collaborations between their existing bands and to “organise the logistics and running order for the musical items” (11). Playing music was partly about performing or entertaining but also seen as a process of sharing, informal collaboration and experimentation between the musicians in the street (1, 12 and 17). Spontaneous opportunities were encouraged through an “open mic” session enabling other people to join in and for new collaborations to emerge. Interviewees associated playing and engaging in music with conversation, interaction and dancing during the event and more lasting collaborations and friendships after.

Creative, sharing practices were also evident on the day as people brought out ladders to put up bunting, negotiated where different element of the party should be sited and set-up different elements. They decorated the street, the exteriors of their homes, set-up stalls and prepared activities. There was a photo booth, a street museum, a badminton court, Zumba, a quiz, art activities, face-painting, football, a storytelling clown, Lego building, a book shop, a “chill-out zone” for teenagers, a display from a local boxing club, food stalls and a “conflict resolution centre” (Plate 1) for water fights.

During the party people engaged in a variety of activities; they talked, ate together and played football. Children threw water bombs at one another, people danced and listened to music. Creating and participating in these events is an example of active placemaking (Franklin and Marsden, 2015) encouraging “plasticity of habit” (Noble, 2013, p. 176) by disrupting mundane interactions and producing memorable experiences to support post-party social interactions in the street. Similar to studies by Semenza and March (2009) and Noble (2013) at this party communal creativity developed encounters, shared experiences and collective memories.

**Performing and reinforcing place values.** In the street party place values were articulated, performed and reinforced, a process of active meaning-making (Stokowsky, 2002) which developed shared understanding of the community and place. Friendliness and inclusiveness were the two most commonly identified characteristics and
values of the street. Neighbourly friendliness was identified by all interviewees and was associated with sharing and caring that crossed diverse social, ethnic, and cultural groups. It was “learned” (12), actively “practiced” (6 and 15) and required an understanding of the “concerns and problems faced by neighbours” (12). It was performed as people prepared for the party together, and through the temporary intensification of friendliness during the party. Six interviewees who were not born in the UK described the party as part of a process of feeling welcome, and creating a sense of belonging in the street. Interviewees identify a family friendly street where people care for neighbours children, “and help each other out” (19). This characteristic was reinforced at the party by the provision of many childrens’ activities despite the majority of residents not having school age children. Family friendly was broadly constructed and supported by residents inviting family members and friends with children.

There was a widely held aspiration “to be inclusive of everybody in the street” (9) and this inclusiveness was articulated and performed through sharing and convivial interactions among a diverse range of residents during the party. There was no formal organisational structure for the event and several interviewees identified differences in peoples’ involvement. Those most engaged in setting up the event were predominantly white “middle-class people” (1, 2, 3 and 9) and two interviewees identified practices that might inadvertently exclude people including the location of planning “meetings in people’s
homes” (1) and informal “around the table” decision making (9) which favoured the most confident and articulate residents. However, all interviewees noted that the people who took on organisational roles created the basic structure for the party and carried out tasks that others did not want to do. Without a formal organisation several residents took on the “practical stuff […] getting funding […] booking the clown, getting Arsenal to come along” (9), “filling in the application forms and getting the insurance sorted” (4).

This approach was “organic, inclusive and bottom up” (10), but created a basic infrastructure under which small events and activities could be developed by individual households and groups outside peoples’ homes. Interviewees unanimously supported the lack of formal structure and it was seen as a way of engaging more people and providing freedom for individual households and sub-groups to organise party activities independently. Many individual households developed activities – some of which were communicated to other residents and others which emerged on the day. This informal and often spontaneous engagement reflects the emergent, relational and social nature of partying. All interviewees thought that the street party was inclusive, “on the day everyone will turn up and be part of it” (9) and saw high turnout as reflecting a widely shared aspiration for an inclusive party where people could meet neighbours.

The street party “activates and is activated by ideas and issues about ‘community’ identity and ‘place’ that were already in circulation” (Ouffy and Mair, 2014, p. 54). It enabled people to engage in atypical activities and interactions and to perform and reinforce commonly held values in an interactive process that developed their sense of the community within the street. People’s interactions, experiences and active engagement within the physical setting of the street created, reproduced and defended place values and meanings (Cresswell, 1996).

Discussion
Several characteristics of the street party that develop a place-based sense of community are discussed below.

Proximity to home
The street outside peoples’ homes is “local” a “sphere of familiarity and intimacy” (Hall, 2012, p. 130) a place of mundane routines and interactions which is both public and personal (Wessendorf, 2014). The location of the party outside peoples’ homes supported a sense of entitlement, comfort and belonging, empowering people to arrange and take part in activities on their own terms. People felt free to set-up picnic tables and activities independently of the main organisation of the party which supported devolved practices in the articulation of street values. This party was located on the street but is dissimilar to other initiatives which use recreational and social activities to promote social interaction. Unlike the “Ciclovía” and “Open Street” projects (Mason et al., 2011; Zieff et al., 2016) it was developed by people who live on the street and unlike “Play Streets” (D’Haese et al., 2015) it sought to involve all residents. These differences supported diverse engagement in a shared experience which contributed to the ongoing process of placemaking.

Ephemerality
While residents aspired to neighbourly friendliness, differences in their daily lives meant mundane interactions were often fleeting. The party provided an unusual and short-lived opportunity to step outside of the hectic “messiness of everyday life” (Heil, 2014, p. 456) and to meet, interact, engage with difference and create shared experiences and neighbourhood values across a diverse community. Temporary reconfiguration of the street created a “loose” space (Franck and Stevens, 2006) and makeshift structures and activities provided
opportunity for convivial interactions and the suspension of mundane social relations. The ephemeral nature of the party meant that negotiations about the uses of the street space were relatively relaxed. The emphasis was on a short-lived surge of conviviality and pleasure – any inconveniences were short-term – at the end of the day the street reverted to its mundane form. Experimentation, creativity and celebration provide a way of loosening social/spatial relations (Sharpe, 2008) which is enhanced by the party’s temporary, irregular and voluntary nature.

Each of the four recent street parties were developed by different alliances of people and enacted in different ways. This creates a fluidity and an approach to organisation that is flexible, relatively open and adaptable. A burst of energy (Brent, 2009) is required to create a party and this sporadic format enables different residents to engage with varying intensities and in multiple ways. The ability to encompass diverse contributions, shifting commitment and informal structure, coupled with recovery time between events means that people who would not normally volunteer or who are wary about committees and formal community structures choose to engage.

The ephemerality and lack of formal organisational structures associated with the party is both a help and hindrance. Its diffuse and shifting structure facilitates varied opportunities for engagement and draws together diverse residents. However, without a formally constituted community organisation it is difficult to access to funding and support from the local council. In this case, the councils’ decision to waive street closure charges for street parties combined with donations from several local businesses to cover insurance costs enabled the party to proceed.

Wide-ranging opportunities for encounter and conviviality

The street party format enables diverse opportunities for encounter around a core of organised events, complemented by an array of activities, performances and installations provided by sub-groups of people and individual households. It uses creative and pleasurable activities such as cooking, participatory musical performance and house decorating to express and share diverse backgrounds, experiences and needs. Partying also includes more informal and spontaneous convivial activities that arise by “just being there” (8), these include “bringing out a table and chairs and sharing some wine” (6), “speaking to my neighbours” (15) and “dancing in the street” (7); the mixture of centralised/devolved and formal/informal activities engages its diverse residents and includes spontaneous or unexpected aspects, for example, one family invited a Zumba teacher who led an impromptu class during the afternoon. The party supports shared practices of “remembering, exchanging, investing and adapting […]” (Hall, 2012, p. 134) through engagement in this diverse mixture of activities. By creating common experiences and conviviality it adds another layer in the ongoing development of residents’ sense of place.

Pleasure

The links between festivity, pleasure and social action are identified by Sharpe (2008) and are supported by this study. “It’s always good to have some fun. The fun aspect is quite important encouraging us to get together for a party” (7). Anticipated, lived and remembered pleasures encourage people to engage with the party and with one another. Pleasure is key to developing a place-based sense of community. There is a sense of pleasurable anticipation as people plan and engage in diverse practices of creative thinking, designing, cooking and rehearsing musical contributions. The multiple micro-processes to develop activities and food are pleasurable in themselves and are an integral aspect of their enjoyment.

The conviviality, playfulness and pleasure experienced during the party enable people to experiment with, articulate and perform community values of friendship, sharing and
inclusivity. The festive setting provides gaiety, cheerfulness, joyousness (Falassi, 1987) through engagement in a variety of pleasant experiences, social interactions and unexpected contributions dispersed in different locations along the street. The convivial and celebratory context enables greater unpredictability than would be accepted in a more serious endeavour – randomness and surprise are part of the fun. The pleasure endures through shared recollections and conversations in an ongoing collective meaning-making process (Cresswell, 1996; Noble, 2013; Stokowsky, 2002) which creates an intangible community resource in the form of a profusion of stories and memories. These stories are based on wide-ranging experiences of conviviality, celebration and sharing, cannot be owned, fought over or managed in the way a more tangible resource would be.

Disruption

The conviviality born out of everyday relations provides way of living with and negotiating difference. However, mundane convivial relations can be careful, polite and can become locked or routinised (Amin, 2002, 2008; Georgiou, 2017; Heil, 2014; Wessendorf, 2014). The street party explored here creates introductions and unusual interactions across diverse groups “destabilizing boundaries and creating new spaces for negotiating across difference” (Leitner, 2012, p. 830). Amin (2002) argues that temporary activities do little to develop sustained interaction and engagement between different people. However, in this study the temporary occupation of the street is part of the ongoing practice of articulating and performing aspects of community and appears to have lasting effects. The intense conviviality, interactions and experiences of pleasure at the party cannot be sustained, but form the basis for shared stories and memories which underpin street-based familiarity, feelings of belonging and sense of place lasting well after the event. These findings resonate with Noble (2013), who identifies incidents or moments which disrupt and open up relations, the effects of which persist through shared experiences and recollections. In this case study, the disruptions of the party form a wealth of pleasurable experiences and support a collective enthusiasm to engage, meet neighbours and develop a sense of community within the street.

The 2016 party builds on experiences from previous parties. Partying is an ongoing practice of interruption of mundane relations which enables the articulation and performance of community values and provides opportunities for active engagement between different people. Creating and recreating atypical conviviality through an enjoyable enactment of community opens-up and reworks relations (Fincher and Iveson, 2008; Askins, 2016). After each party, things go back to normal but it is a different normal – people have met new neighbours, enjoyed something together and have collective memories and shared stories adding another layer to the ongoing process of developing their sense of place.

Conclusion

This paper develops understanding of the ongoing, relational and social practice of placemaking in diverse urban areas by exploring the processes and characteristics of a street party. The party is a relatively intangible aspect of placemaking, leaving little physical detritus in its wake, but is an important process by which people actively develop, negotiate and perform a place-based sense of community. This party connects people to their neighbours and their neighbourhood, enabling enjoyable interactions and experiences which destabilise and rework relations. It has long lasting positive impacts as community values of friendliness are performed, retold and become part of the narrative of the street, a shared resource held in the form of stories and memories.

Partying encompasses making, doing and sharing practices and enables residents to articulate, perform and reinforce street values. The temporary appropriation of the street for communal neighbourhood festivity loosens its rules and meanings, activating sociability
through collective experiences which are pleasurable and out of the ordinary. Location in the street – the shared, familiar and multi-use place outside people's homes creates a sense of ownership, appealing to and engaging its diverse residents. People participate on their own terms and playfully experiment with new possibilities. Pleasure and placemaking intersect through the activities, conviviality and friendly interactions at the party. Partying helps people to narrate story of the street and their place within it as they collectively create community meanings.

These findings of this study are optimistic, reflecting primary research which did not reveal negative feelings about the party, even from those interviewees who did not attend. While three interviewees questioned whether white and middle-class people might have dominated the organised elements of the party – all agreed that there were diverse opportunities for engagement, enabling the majority of households chose to participate in one way or another. Further study in other places would be useful to investigate the extent to which positivity and optimism are common features of street parties.

On-street partying can create placemaking opportunities but also presents some challenges to decision makers. There are political and practical risks associated with this type of informal, temporary, voluntary and unpredictable community endeavour. For example, in this case it was not possible to pinpoint a single person who instigated, led or held responsibility for the street party which had emerged from casual interactions between individuals. The organisation lacked transparency and this presented challenges to policymakers as there was a risk that the street party might only represent and provide opportunities for small segments of the community. Informal and ad hoc organisation meant that residents were unable to bid for funding to support the event and created some risks in terms of the management of the event itself. Without a formal structure or funding residents did not have the resources to support effective crowd control had too many people attended. Finally there is an unpredictability and risk associated with partying, a pleasurable activity that reduces peoples' inhibitions and can support social interaction or alternatively lead to anti-social behaviour or ignite existing animosities.

These challenges were not apparent in the research undertaken for this study where a mixture of an informal organisational structure and the location outside peoples' homes enabled people to choose how and when they contribute to the party. There were enough central organisations to arrange the street closure and a core of activities and freedom for people to organise small events and activities outside their homes. Residents were unable to bid for local council funds but were supported by the council who waived street closure charges. The nature of the party meant that it did not attract a vast crowd and while there were noisy, unusual and exuberant behaviours, none of these is perceived to be anti-social in the party context.

It is easy to underestimate the potential of the party as a placemaking mechanism due to its ephemerality, association with pleasure, informal decision-making structures and the difficulty in seeing or quantifying its outcomes. However, it is argued here that anticipation, lived pleasures and memories of partying create a collective resource of convivial experiences and memories which develops a common sense of place. The street party effectively combines conviviality, playfulness, friendliness and pleasure to engage people in the serious business of placemaking. It enables people to articulate and perform important values, develop shared experience and create common stories which are retold in conversations, through shared photographs and social media. This collective resource persists in the minds of residents, is held across the diverse community and cannot effectively be owned or appropriated by one group.

In this study, periodic active involvement in on-street partying develops sense of place by disrupting routine interactions and enabling people to articulate and perform neighbourly friendliness. The contention here is that the conviviality associated with
partying disrupts mundane social relations and has potential as a tool to engage diverse communities in placemaking. Further research is required to consider the intersections between the temporary pleasures of partying and placemaking in other settings and to consider how such disruptions might be supported and encouraged by decision makers.

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