

# Key elements for designing a strategy to generate social and environmental value: A comparative study of festivals

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The world of events is becoming more competitive. Governmental bodies need to be more thorough in justifying public expenditure and its consequences, and commercial entities strive for exemplary corporate social responsibility. At the same time consumers are becoming more demanding; they want to consume ethically, and expect leisure and hospitality organisations to practice sustainable hospitality. Sustainability is therefore becoming a must for events. This research explores the key elements in designing a strategy when generating social and environmental hospitality value at events is a priority. The study is grounded in empirical data, using music festivals across Europe as case studies. Six key elements have been identified, among which are: visionary leadership, authenticity, and strategic partnerships. Based on the findings, we propose a design approach to generate social and environmental value for events.

**Keywords:** design, events, innovation, hospitality sustainability, strategy, trends

## Introduction

The world of events has grown more complex. There are a larger number of autonomous and interrelated elements impacting the competitiveness of events. For instance, the number of events is increasing, while funds and sponsorship are decreasing, and potential sponsorship is more selective. To illustrate, a few statistics follow from two well-known festival nations in Europe, UK and the Netherlands. In the UK, more than 900 festivals were organised in 2012. About 5% had to be cancelled due to poor ticket sales (eFestivals, 2012). In the Netherlands, about 774 large festivals (with more than 3 000 hostees) were organised in 2013. Since 2012, and including newcomers, 18% of the total number of festivals were not successful (Van de Haterd, 2013). At the same time, the audience is more demanding in terms of value for money, and target groups are becoming more intertwined. Established events need to compete with a growing mass of underground and pop-up events, with adepts of pop-up culture becoming increasingly web-connected in self-organised communities through word-of-mouth (see PopUp Culture, 2013). Therefore, events are affected not just by business competitiveness but also by the fluidity of the external environment. For example, with the growth of social media (O'Brien, 2011), the number and type of stakeholders that can have a large impact on the image of an event has multiplied.

Therefore, stakeholder dialogue is no longer enough: companies need to be stakeholder confident (Ernst & Young, 2011) to be able to cope with both diversity and complexity. Festivals and events are no exception, if they are to remain competitive.

One of the topics being raised by stakeholders is sustainability. Sustainable hospitality (at events and other leisure activities) is rather fluid, as sustainability does not have

a single definition (Melissen, 2013). At the same time, and as put by Yeoman (2013, p. 254), consumers are becoming "more demanding, sophisticated and informed." They want to consume ethically, and they expect organisations to take their social and environmental responsibility seriously. The consumer expects explicit corporate commitment. Consumers want, more and more, to "express their personalities" through what they consume, and festivals are, par excellence, places for that (Yeoman, 2013, p. 256). Sustainability is therefore becoming a must for events. Governments, corporate sponsors, and local communities are among the stakeholders calling for sustainable and responsible events (Pelham, 2011).

This urgency has also been reflected in the increase in research on the topic of sustainability of events. In recent years, studies have been published on the policy for sustainable events (Getz, 2009; Dredge & Whitford, 2010), sustainability impacts and models (Raj & Musgrave, 2009), residents' perceptions on sustainability (Konstantaki & Wickens, 2010), the need for new business models (Pelham, 2011), case studies (Jones, 2010), and barriers and opportunities (Ponsford, 2011). For further reading on the sustainability of events, we refer to the special issue on the topic which appeared in the journal *Event Management* in 2011 (Lawton, 2011).

Recently, Mair and Whitford (2013) reported on the opinion of events experts regarding the importance of topics to be researched in the area of events. Not surprisingly, an event's impact is number one in importance. Within this are socio-cultural and community impacts, economic impacts, and environmental impacts. Richards, de Brito and Wilks (2013) edited a book on the social impacts of events with several case studies from Europe, South Africa and Australia, illustrating the social impacts of events from street soccer and community events to the Olympic Games. Environmental/sustainable impact is also identified as one of the main five themes which

events researchers are working upon (Mair & Whitford, 2013). There is what can be called an outcomes obsession among stakeholders (Sharples, 2014). Yet, in respect to research, there is still a long way to go, and Mair and Whitford (2013, p. 16) are correct in concluding the following: “The directions for future events and festivals research ... appear clear – more research on the socio-cultural and environmental impacts of events is needed”. Kim, Boo, and Kim (2013) reached a similar conclusion after reviewing 178 event-related articles in the top three tourism journals for the past 20 years. This goes along with the pleas of Getz (2010, p. 20) for “a more balanced, triple-bottom line approach” in evaluating festival impacts.

We would argue that it is important not only to measure impact, but also to learn more about how to generate a positive impact, or in other words, to investigate what is key regarding an event's strategy so that environmental and social value can be generated. This research contributes to this first step: it identifies, by means of European case studies, key elements in designing a strategy where generating social and environmental value is a priority. Based on the findings, we propose a design approach to generate social and environmental value for events, so that sustainable hospitality can be a true asset at events.

## Methods

### *The research approach*

This research is based on empirical data developed through comparative case studies, with the unit of analysis being an event. More specifically, this study makes use of three European music festivals: Roskilde (Denmark); Boom (Portugal) and Paléo (Switzerland). Originally, two additional European festivals were selected and researched including a festival in Germany and another one in the Czech Republic. After preliminary examination (including the analysis of interviews), however, it proved that the data from those two festivals were not rich enough for a thorough analysis, and they have therefore not been described in this paper.

Thus, the festivals were selected based on their genuine interest in sustainability. This was legitimised in several ways: (1) by expert stakeholders on the event sector, (2) by peer festivals, (3) by having rich data related with sustainability, and (4) by their active participation in the GO Group. GO stands for Green Operations, and it describes itself as follows: “GO Group is an independent, pan European and cross industry think-tank to inspire people in the music festival and events industry to run their operations greener and smarter” (GO Group, 2013).

The initial collection of secondary data was cross-checked, juxtaposed and/or complemented as much as possible with primary data. Secondary data were gathered from internet sites of the festivals, presentations and articles and documentaries about the festivals. With two festivals (Roskilde and Paléo) primary data were additionally collected through semi-structured interviews, using an item list (see Table 1). At Roskilde, a project manager was interviewed, and at Paléo the interview was with the Press and Media Officer. The interviews comprised general items about the festivals (vision, mission, consumer orientation, community involvement, partnerships and other stakeholders' involvement, as well as the ins and outs of the communication of the festival, including social media usage). We also zoomed in on value creation for the

**Table 1:** Item-list for the semi-structured interviews

Topics	Issues covered
The festival	Vision, mission, motivation of the festival Audience oriented actions Community involvement in the festival Partnerships/stakeholder involvement Communication/social media usage
Value creation for the audience	Audience involvement (before, during, after) Co-creation Linked to sustainability?
Sustainability at the festival	Sustainable policy/ philosophy Sustainable actions of the festival (before, during, after) (Recent) Innovations/Actions
Improvement points and future outlook	Lessons learned from previous years Points of improvement Goal for the future
Known best practice	Example of best practice

audience: its involvement before, during or after the festival, whether or not there were co-creative initiatives and if so, if they were linked with sustainability. Another topic was the sustainability at the festival (covering the sustainable policy/philosophy, specific actions before, during, or after the festival, and whether or not there have been recent innovations). Finally, we asked festivals to reflect on points for improvement and on future outlook (lessons learned from previous years, points for improvement, and specific goals). Furthermore, we gave the festivals the opportunity to name a well-known best practice in the festival world. With the Boom festival, no formal interviews were carried out. There was online communication and, moreover, the festival and its approach to sustainability were very well documented on its own site with video presentations and other related documents.

### *Data analysis*

When an event aims at generating social and environmental value, this calls for careful design of a strategy in staging a sustainable event experience. Gupta (2012) shows that there are six dimensions of business strategy interrelated with experience marketing: visionary leadership, customer orientation, unique company capabilities, barriers to imitation, employee empowerment, and internal marketing. Given that data could not be found for all those items, nor could all the items be thoroughly covered in the interviews, we adapted Gupta's framework for analysis as indicated in Table 2. For visionary leadership we looked into the sustainable ambition and risk-taking of the festivals; we took a broader view than Gupta (2012) on empowerment, going beyond empowerment of employees to consider empowerment of volunteers, the audience and the surrounding communities, as that is more appropriate in settings like festivals (compared to companies). On customer orientation, we considered the hospitality, service and the level of tailor-made solutions in the event. Instead of analysing the capabilities and barriers to imitation separately (as proposed by Gupta, 2012), we examined innovativeness as a whole, i.e. the degree of introduction of new (sustainable) services, products, or processes.

In addition, and inspired by grounded theory (Glaser, 1982), any additional empirical observations (left unmatched by

**Table 2:** Framework of analysis

Framework of analysis for the case studies (adapted from Gupta 2012)	Explanation	Strategic management & experience design Gupta’s (2012) principles
Visionary leadership	Sustainable ambition and risk-taking	Visionary leadership
Stakeholders’ empowerment	Empowerment of stakeholders, including staff, volunteers, community and audience	Empowerment (employees)
Customer orientation	Hospitality, service, and level of tailor-made solutions	Customer orientation
Innovativeness	Degree of introduction of new services, products or processes	Company capabilities Barriers to imitation
Internal marketing	Informal information generation and dissemination	Internal marketing

Gupta’s theoretical framework) will be noted and compared in a thematic data matrix (Ritchie, Spencer, & O’Connor, 2003), so as to check whether or not additional key elements emerge.

Afterwards we will apply inductive reasoning. By using empirical observations (both fitting the framework of analysis, as well as additional observations), we will identify key elements for designing a strategy to generate social and environmental value. After that, and based on the identified key elements, we will propose a three-phase model for festivals in designing such a strategy.

Thus, three European festivals (Roskilde, Boom and Paléo) were directly used to build the proposed strategic model in this paper. In addition, we checked the data collected regarding two additional festivals (in Germany and the Czech Republic). The data of these two festivals were not used to build the model, but we did use any data pertinent to those festivals to check whether or not they would falsify the model. There was no evidence (from the five cases closely looked at for this research, or any cases known to the authors) to rebut the model. Nonetheless, the model should be further tested. We come back to that in the conclusion and discussion.

**A responsible economy**

**Consumers and a shifting value system**

Consumers’ and society’s value system has largely shifted towards the experience economy (Pine & Gilmore, 2015). The customer of today and the one of tomorrow expect more from hospitality services, leisure activities in general, from events, and in particular festivals. As Calvo-Soraluze, de Brito, & San Salvador Del Valle (2015, p. 71) state: “most consumers have an informed opinion (or, at least, they think they do) and they challenge authority, corporations, and become more demanding”. One of their demands is “consuming with ethics” (Yeoman 2013, p. 255). Overall, the consumer of today is far more experienced and less easy to please (Jayawardena et al., 2013). With social media, consumers have been given a louder voice, and they do not hesitate to use it to express their needs and wants with their (online) friends or by engaging in discussions on online platforms. Through the Internet, not only has the power of accessibility of information shifted towards the consumer, judging and rating of services have also pressurised the industry (Litvin, Goldsmith, & Pan, 2008). There is, therefore, and as claimed by Calvo-Soraluze et al. (2015, p. 71), the rise of “a new consumer with new demands”. This consumer is “connected, informed, participative, impatient, experience-seeking, with a shifting values-system.”

**Designing for value**

Teixeira et al. (2012, 364) refer to Vargo and Lusch’s (2004) service-dominant logic, stating that “customer experience is not designed; rather it is co-created through customer interactions with the several service elements.” In the same spirit, Beltagui, Candi and Reidel (2012) stress that service design has both a functional as an emotional purpose. Applying their framework, one can place events in the category of deliberately experiential services. This deliberateness does not mean, however, that event organisers totally control what the audience is to experience. Event organisers can simply be facilitators, to “enable customers to have the desired experiences” (Zomerdiijk & Voss, 2011), or in other words, to set the stage for the experience. For a review and a reassessment of marketing experience, we refer to Tynan and McKechnie (2009).

When an event aims at also generating social and environmental value, this calls for careful design of a strategy in staging the sustainable event experience. As mentioned before (and as adapted from Gupta, 2012), there are several elements of business strategy interrelated with experience marketing: visionary leadership, customer orientation, innovativeness, stakeholders’ empowerment, and internal marketing. These dimensions will be used to analyse the cases (see again Table 2).

**The cases: Three European festivals**

The following sections present the case studies: three European festivals for which generating social and environmental value is part of their priorities. Inserted quotes are from the interviews with the Project Manager (at Roskilde) and with the Press and Media Officer (at Paléo).

**Roskilde Festival, Denmark: Co-creating sustainable meaning**

The Roskilde Festival is a music festival in Denmark established in 1971. Organised by a non-profit organisation, the Roskilde Festival Charity Society, it has the following mission statement: “to support initiatives benefitting children and young people humanitarian and cultural work” (Roskilde Festival, 2013). Accordingly, in the last 30 years the Roskilde Festival Charity Society has donated about € 23.5 million to organisations such as Doctors without Borders, Amnesty International, Save the Children and The World Wildlife Fund (WWF). The target group of the festival is youngsters between 18 and 25. The visitors are primarily from Denmark (88%), and the remainder come mainly from Sweden, Germany, the Netherlands and

Great Britain. In future editions, the festival would like to double the percentage of people coming from abroad. Currently, there are about 80 000 visitors, during four days of festival.

Almost 20 years ago, Roskilde Festival carried out the first environmental survey and this led to an environmental policy with four principles: mitigation of resources use, use of environmentally-friendly products, maximising waste recycling, and safeguarding the health and security of the participants in the festival. Roskilde Festival has an Environmental Group that makes sure that those four principles are translated into practice, for instance, by using eco-labeled or organic products, refundable deposits on plastic cups and bottles, and donation of leftover camping material (see Roskilde Festival, 2013).

Through the years, Roskilde has become more daring, adopting co-creation in its sustainability endeavours, and bringing together sustainability, interaction and creativity. An example is the Dragon Workshop where participants learn how to make flying dragons out of unwanted tents. Another interactive project involved an artist making 250 bird houses that could be tagged by the festival fans, which would, later on, be spread in cities around Denmark. Photos would then be posted by fans on a dedicated Facebook page, with about 165 000 followers.

However, and as put by the Project Officer: "It is important to engage people in creating an environmental[ly] friendlier festival, but the festival has to show that they care otherwise it won't work". One of the areas where Roskilde shows it cares has to do with the "Help a homeless" initiative. Attendees have the opportunity to donate their sleeping bags or soft mats to the homeless. Within three years, the festival collected about 5 800 items. The festival also has several thematic zones which have been added over time. One of those is the so-called Poor City festival area designed to create awareness of young asylum seekers in Scandinavia. This zone includes activities led by the Danish Red Cross, and participation of homeless people in Denmark, along with musical performances. This thematic zone in the festival is perfectly aligned with one of the causes of Roskilde foundation: the inclusion of young asylum seekers in the "we feeling" of the festival. This is done by getting them involved, as much as possible, as volunteers during the festival, but also in additional activities, before and after.

"Cooperation is rather on a national level than a regional level" (such as with Tuborg beer, or the Red Cross, as mentioned). "This has to do with Roskilde being actually a figurehead for festivals in Denmark, and one of the largest in Europe" (Roskilde Festival Project Officer). Roskilde cooperates with technical universities in Denmark in the search for sustainable solutions, being involved in research projects on topics such waste management, sound technology, and crowd management: "We want to be proactive and set standards on social and environmentally related areas of responsibility: code of conduct, minimise waste, increase recycling and saving resources" (Roskilde Festival Project Officer)

#### ***Boom Festival, Portugal: A "self-sustainable" festival***

Boom is an independent festival, founded in 1997, and takes place in Idanha-a-Nova, Portugal every two years, for a week, in the summer. It is staged in the interior of the country, on the shores of a lake. Boom's vision is to create an alternative

reality, where the audience is one with nature, regardless of age or origin. Its 2012 edition drew about 30 000 participants, with 85% being from abroad, coming from 102 countries. The target group of the festival is trans-generational, so it includes young people, adults with kids, to the over-fifties or older.

Boom's mission is "to provide a unique experience where all participants are at one with nature, celebrating with likeminded people from around the world, respecting the environment and promoting key capacity, education and knowledge" (Boom Festival, 2012).

As put by André Soares, the environmental programme designer of Boom, the festival is "a space for an experience" to "gather together art, nature, water, people, beauty, music" and "to make a transition" towards sustainability. Since 2004 Boom has adopted self-sustainable principles of permaculture design to take care of the earth and its people, to set consumption limits, and to redistribute surplus (see Permaculture Principles, 2013). André Soares is confident: "we have the knowledge, we have the technologies" (Boom Web TV, 2014a). Accordingly, permaculture principles have been translated into Boom's eco-programme, which has three pillars: contact with nature, technologies (such as bio-construction) and artistic awareness (eco-art). Some of the practices include renewable energy: e.g. used kitchen oil from the community; water treatment; self-cleaning water with plants; reusable materials (e.g. from Rock in Rio festival); cradle-to-cradle installations (natural materials such as clay, collective transportation packages from the airport; garbage collection kits offered to the audience for free; and eco-consciousness educational activities during the festival. These efforts have been recognised in the form of awards: Boom got the Outstanding Greener Festival Award in its last three editions (2008, 2010 and 2012).

#### ***Paléo Festival, Switzerland: A festival rooted in its region***

Paléo festival takes place in July over six days at Nyon, Switzerland. It was first run in 1976, and is now visited by about 230 000 people annually. Most visitors are Swiss, aged between 20 and 29, with about 10% coming from abroad, mainly from France. The programme includes both established stars as well as rising talents. It covers a wide spectrum of music styles and performances, including street and circus acts. Paléo sees itself as a global village and pays attention to the details such as the choice of food and crafts, décor, and the reception of the visitors.

The organisation itself contains only people from the region. New vacancies are not openly publicised; they are communicated within the staff's social networks, fitting the desire of the organisation to keep things in control. The festival is run by about 4 500 volunteers, 70% being Swiss, and 30% foreigners, of whom two thirds are from France. The festival uses different kinds of media to communicate with their target group: newspapers, radio, posters, and social media (Facebook and Twitter). The festival has several partners in Switzerland, most from the French part of the country. In particular, the festival collaborates with HTS, a technical university, in a diversity of educational projects.

The festival has its own environmental policy, aiming at reducing the environmental impact of the event, through various measures such as stimulating the use of public transport (which is now at 50%), sorting waste, promoting

local consumption, stimulating use of green energy, promoting sound quality and including quiet areas at the festival. The festival is aware that most of its impact (in terms of CO<sub>2</sub> emissions) is transportation, and efforts have been made to improve this. “The values of the festival are the same as 40 years ago, but now they are on a charter which give the same weight to economic, ecological and social elements. The festival wants to be a role model for visitors and therefore we are highly committed to keep up with our values” (Páleo Festival, 2013)

There are shuttle busses and special trains during the festival with reduced fares in all trains for all during the festival week. To influence the choice of transportation of the artists is still a challenge. Also other initiatives have not yet been as successful as expected: e.g. an app to support car-sharing.

In spite of the challenges, the festival has won several sustainability related prizes: the WWF’s Paléo Festival Nyon champion in terms of environmental protection (2009), the MIDEM Green World Award (2008), the “Green’n’Clean Award” accreditation (2007). The festival is aware of its role as a socially responsible organisation, and it supports a variety of charitable and socio-cultural activities. Since 2005, it has identified its values, where respect for stakeholders (public, volunteers, staff, artists), respect for the environment, and social responsibility are central (Páleo Festival, 2013).

Next, we look at the key findings of the research and propose a model for events aiming at designing a strategy that also generates social and environmental value.

**A sustainable festival: exploring key elements for a successful strategy**

As explained in the methods section, the festivals were selected based on their genuine interest in sustainability. As stated previously this was legitimised by: (1) expert

stakeholders, (2) peer festivals, (3) rich data on sustainability, and (4) active participation in the think-tank GO Group. This was further validated by the findings: it can be stated that all three festivals show willingness to be sustainable and also devote efforts to achieving it, corroborating the views of experts’ and of their peers.

This said, not all three festivals have the same degree of embeddedness of sustainability in the festival. Boom and Roskilde lead in terms of sustainable reputation, also attested by the experts on events we have consulted. Paléo has won several eco-awards in the past but not that many in the last years, showing a slowdown in continuous, adaptive and dynamic sustainability efforts. Though Paléo is trying to innovate, it can still be regarded as a rather closed organisation (see Bodó, 2004). Paléo is very locally/regionally focused and not that much of a risk taker. For instance, plurality could be added. Thus, while Boom and Roskilde have a sophisticated embeddedness of sustainability in the festival, Paléo’s embeddedness is still maturing.

Next we will report on the findings: (a) by analysing the data according to the framework of analysis described in the methods section (see Table 2), and (b) by extracting and matching key empirical observations (not fitting the framework of analysis). We will consider a dimension of strategy (either from the pre-determined theoretical framework or emerging) to be a key factor if: (1) it is both embraced by the two festivals having a sophisticated embeddedness of sustainability in the festival, i.e. Roskilde and Boom festivals, and (2) if there is no evidence indicating otherwise (from any of the five cases initially selected for this research, or any other case known to the authors). Note that Roskilde and Boom festivals were also the festivals put forward by peer festivals as the richest cases that one would expect to learn from regarding sustainability at festivals.

**Table 3:** Key elements of strategy: a comparative analysis based on Gupta (2012)

Elements of strategy (adapted from Gupta, 2012)	Roskilde Festival, Denmark	Boom Festival, Portugal	Paléo Festival, Switzerland
<i>Key? Yes</i>			
a) Visionary leadership (sustainability ambition and risk-taking)	An ambitious caring mission statement (humanitarian character) A long tradition of being pioneer (risky)	An ambitious mission with explicit eco & educational dimension No commercial sponsors (risk taking)	Responsible management Low risk-taking
b) Customer orientation (e.g. tailor-made solutions)	Personalised experiential activities & spaces	Nature oriented above all (+personalized experiences)	Attention to details. Hospitality is key Room to improve in personalized spaces
c) Innovativeness	Advanced examples of co-creation	Eco-innovative	Trying to be innovative, but barriers
<i>Key? Not enough evidence/Not conclusive</i>			
Stakeholder empowerment	(the “we” feeling)	Some related evidence, but not conclusive (The tribe feeling)	<i>Not enough evidence</i>
“Internal” marketing	Not enough evidence	Word-of-mouth is central (the ambassadors the tribal chiefs)	Some related evidence, but not conclusive (festival is rooted in the region)
Sustainability embeddedness	Sophisticated embeddedness of sustainability in the festival		Simple embeddedness (still maturing)

### Findings based on the pre-determined framework of analysis

Table 3 presents the characteristics of the three festivals against the six items for analysis, (adapted from Gupta, 2002). Roskilde and Boom festivals can be considered to (1) have visionary leadership, (2) have a strong customer-orientation, and (3) be innovative.

Regarding *leadership* (in being visionary and risk-taking), Roskilde has a long tradition of being a pioneer and has a caring mission statement. Boom has also an ambitious mission with explicit eco and educational features. In addition, in spite of the financial risk, Boom does not accept commercial sponsorships. Therefore these two festivals dare to take risks and have a challenging vision, committed to sustainability values. Páleo Festival shows commitment, and seems to be led according to responsible management principles, but it is not that much of a risk-taker.

Both Roskilde and Boom have *strong customer orientation* (e.g. these festivals have highly tailor-made solutions), with Roskilde putting a lot of effort into personalised experiential activities and spaces. Boom makes a similar effort, emphasising that the audience is free, as long as it is one with nature. Thus, the state of mind of being one with nature is a sort of pre-condition of being able to have a personalised experience at Boom. Páleo Festival takes into account the details in receiving the audience, and hospitality is key. At the same time, it does not seem to reach the level of intimacy that Boom and Roskilde have with their audience.

In terms of being *innovative*, Roskilde shows a high degree of capability in using innovative tools such as co-creation, and Boom a high degree of capability in using eco-technology (not only to literally build the infrastructure but to, symbolically, build the image of Boom). Páleo festival seems to try to innovate regarding sustainability, but clearly there are some barriers. The organisation contains only people from the region, and the partnerships are also regionally acquired, while diversity and plurality are crucial to foster innovation (Forbes Insights, 2011).

Regarding the *empowerment* of the employees/volunteers, Roskilde has an explicit “we feeling” policy: audience and volunteers are as one. Boom has the “tribe feeling” (associated with the alternative reality Boom wants to create with the festival). There is, however, not enough evidence (from this research) on how really empowered employees or volunteers are in taking responsibilities, risks, or what are the incentives and fairness of the system. At the same time, it seems that community building is an important factor both for Boom and Roskilde festivals, the two festivals with a mature reputation and highly committed to sustainability. This said, more research would be needed to be conclusive on this.

With respect to *internal marketing*, there is not enough evidence either, except from Boom where word-of-mouth marketing is central. Boom festival uses ambassadors in different countries to spread the word and the feeling about the festival, who act as the “tribal chiefs” of like-minded people, as if they were a tribe.

To summarise so far, and by inductive reasoning, three strategic elements have so far been considered key in designing a business strategy where generating social and environmental value is a priority:

- *Key factor 1: Visionary leadership*
- *Key factor 2: Customer orientation*
- *Key factor 3: Innovativeness.*

For the other two strategies’ dimensions (stakeholders’ empowerment and internal marketing) there is not sufficient evidence from the cases to support them as vital.

### Findings based on further empirical observations

As stated before, all three festivals show willingness and dedication to being sustainable. The data collected were rich in content, offering more information than just those extracted and fitting in the theoretical framework for analysis.

Taking into account the above-stated findings, we now pay a closer look at the two festivals in this research with a mature reputation regarding sustainability: Roskilde and Boom festivals. There are several empirical observations which are left unmatched by the theoretical framework for analysis. Table 4 summarises six empirical observations. Three of these stand out because they are present in both cases. These are: *authenticity*, *walking the talk*, and *strategic partnerships*. Next, we explain them, one by one.

Roskilde Festival was the only festival broadly using co-creation also regarding sustainability. Picking up on the difference between involvement and engagement (Ferlazzo, 2011), Roskilde is generating environmental and social value with the audience (engaging the audience), and not simply involving them (doing it for them). This generated post-event sustainability-related activities (in time and space), like the bird houses example (see case study description). Roskilde is able to take sustainability and the experience of the festival beyond the time and space boundaries of the festival, expanding the stage of the experience in this way. Making a parallel with Castells (1996), Roskilde Festival was able to create and manoeuvre well in a “space of flows”, transcending “the space of places”. Actually, it was able to transcend both “the space of places” and the time of the event, giving the sustainable meaning of the event an after-life. The festival is doing this with stakeholder confidence, being able to engage diverse stakeholders both in locus, and with social media.

**Table 4:** Additional key elements of strategy based on further empirical observations

Sophisticated embeddedness of sustainability in the festival		
Roskilde festival	Boom festival	Additional key elements
Post-event sustainability-related activities	–	–
Authenticity	Eco-authenticity	Authenticity
Stakeholder confidence	–	–
Walking the talk	Walking the talk	Walking the talk
Strategic partnerships	Strategic (non-commercial) partnerships	Strategic partnerships
–	Educational dimension	–

Boom at the same time is best in being *eco-innovative*, in particular regarding the facilities of the festival (Boom Web TV, 2014b). Boom has of course the advantage of having a dedicated ground for the festival, which offers a lot of freedom to be infrastructure creative and the festival can literally start from scratch. At the same time it has managed to attract sound eco expertise to the festival. So both festivals can learn from each other.

Both Roskilde and Boom have *strategic partnerships*, which also allow them to *walk the talk* in a more authentic manner. For instance, Roskilde has a strategic partnership with the Danish Red Cross, which collaborated in hosting the “Poor City” activities, where asylum seekers and other festival participants co-create music. Boom’s partnership with IPEC (Permaculture Institute in Brazil) allows Boom to implement eco-innovation in the festival, and therefore walk the talk of “being one with nature”.

Summing up, three additional elements of strategy are considered to be key:

- Key factor 4: *Authenticity*
- Key factor 5: *Walking the talk*
- Key factor 6: *Strategic partnership*.

### Designing for social and environmental value: a strategic model

Events are designed to serve a range of purposes (Richards & Palmer, 2010). This study explored key elements in designing a strategy to generate social and environmental value to their stakeholders. The evidence, grounded in comparative case research, and with the use of Gupta (2012)’s dimensions of business strategy for experience marketing, plus emerging empirical observations, led to the following key elements:

- Visionary leadership
- Customer orientation
- Innovativeness
- Authenticity
- Walking the talk
- Strategic partnerships.

Based on the findings, we propose to organise the aforementioned six key elements into a three-phase model for designing a strategy for events aiming at generating social and environmental value. We call it the 3D model, as it has three phases (Discovery, Development and Delivery). The model is illustrated in Figure 1. It builds on the view of strategic design



**Figure 1:** A model to design a strategy to generate social and environmental value

as a process (Montuori, 2003), which is other than simply planning: “Design, in contrast to planning, is an ongoing process” (Morin, 1994, p. 6).

In the first design phase – *discovery* – two key elements are important: *visionary leadership* and *authenticity*. “One of the challenges ahead lies in the development of an integrated view of the environment that goes beyond simplistic either/or dichotomies, and develops a fuller perspective on the interrelationship and interdependence of firm and environment” (Montuori, 2003, p. 11). Discovering, defining and agreeing jointly within the organisation upon the sustainability vision and the authentic values of an event is a key prerequisite towards its success, thus allowing the integral and systemic nature of the event organisation to be fully both acknowledged and recognised by all stakeholders involved, allowing for the ongoing and self-organising networking towards improvement and sustainability stabilisation (Banathy, 1996).

In the second phase – *development* – it is crucial to generate tailor-made solutions, with a strong customer orientation, and that can be strengthened by strategic partnerships. Ideally, the creation by means of engagement in a process of co-creation, both with the customer as well as with the strategic stakeholders, constructing together the identity of authenticity and allowing all voices in creating a sustainable event (Gergen & Gergen, 2006).

In the third phase – *delivery* – the provision of a unique, innovative event, walking the talk of social and sustainable values is key. This can be done by building upon root elements but differentiating with new, *innovative* and creative elements (please recall the Roskilde and Boom cases). *Walking the talk* has the potential to deliver both personal and collective authentic experiences, which ideally will use the participatory voice of the participants, enhancing the potential of the event.

### Conclusions and discussion

In this section we highlight the main conclusions of this paper, we discuss the propose model in the light of the literature, and we put forward proposals for further research.

This research explored the key elements in designing a strategy for events, when generating social and environmental value is a priority. Guided by a theoretical framework, and after the analysis of case studies (five European festivals, of which three in-depth), six key elements were identified. These were organised into a three-phase design model, labeled here as the 3D model:

*Phase 1: Discovery (visionary leadership and authenticity)*

*Phase 2: Development (customer orientation and strategic partnerships)*

*Phase 3: Delivery (innovation and walking the talk).*

Regarding the first and second phases of the model, this empirically based paper has corroborated what Edginton (1988, p. 5) had conceptually envisaged: that “the ability to be visionary, to be agile, to build collaborative partnerships” would be key in managing leisure in the 21st century. Sustainability is considered “as a matter of festival survival” according to five festival leaders and as reported by Ensor, Robertson, and Ali-Knight (2011). Those festival leaders identified leadership, organisational culture, type of (funding) partnerships, and the focus of the festival, as elements

contributing to the sustainability of festival (see Harrington et al. 2014). On the first ones, and as reported in this paper, both leadership and authentic values (strongly intertwined with organisational culture), and strategic partnerships (more than just funding partners) were found to be key contributors for the sustainable value that an event can generate. Since the cases studied here were all music festivals, further empirical research is needed to assert whether or not the key elements identified here are dependent of the focus of the festival. It would be of interest to further investigate other types of events/festivals.

Regarding phases two and three of the model, Getz and Andersson (2008) see both innovation and stakeholder engagement (which includes strategic partnerships) as key to generating not only social and environmental value (as studied here) but also economic sustainability. Innovation and strategic partnerships did come forward as key factors in this research, but stakeholder engagement (in general) did not. Thus, further research is needed on the role of stakeholder engagement, and on the type of stakeholders that are crucial to engage with.

Furthermore, there is a need to further deepen insight into the issue of using co-creation. As put by Tynan and McKechnie (2009), the marketing experience is to be managed “through its whole lifespan including the pre- and post-experience stages.” Only in one case (the Roskilde Festival), was co-creation highly used in general, and it was also being applied to engage the audience in sustainability related topics, inclusive beyond the festival setting. Co-creation and employee/volunteer empowerment can trigger innovation and value (Ramaswamy & Gouillart, 2010; Mukhtar, Ismail, & Yahya, 2012). Applied to the context of this research, it requires that festivals engage with their stakeholders not as passive witnesses of sustainability but as collaborators in co-creating a sustainable festival, as confirmed also by Lashley (2015a), stating that personalisation and individualised services are additional strong trends, offering each guest a tailor-made service.

Taking into account both the above delimitations as well as further research possibilities, the current paper’s analysis, findings, model and recommendations can be further tested, validated and developed. On the one hand, testing the validity of the model and its transferability to other settings by enriching it with more case research (events/festivals of diverse nature and with or without mature/developing/emerging attitude towards sustainability); on the other hand, testing the validity of the model by applying it in practice to different types of events, thus revealing the applicability as well as the potential for further development and improvement. The authors intend to apply the design approach, in collaboration with diverse events, in the near future, and to report on the lessons learned.

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