



REINVENTING RURAL PLACES

The extent and impact of festivals in rural and regional Australia

PROJECT BACKGROUND AND AIMS

Against a backdrop of rural decline, many places have sought to reinvigorate community and stimulate economic development, through staging festivals. Rural festivals have proliferated and diversified in recent years from the traditional country show to evermore diverse niches. Are such festivals significant for rural communities in contrast to their apparent short-lived nature? The ARC festivals project sought to answer this question.

From 2005-2008 we examined festivals in rural and regional Australia through a database profile of festivals across three states (NSW, Victoria and Tasmania), surveys with several hundred festival organisers, and in-depth case study research on the economic and cultural significance of festivals.

Specifically, the project's three stated aims were to:

1. profile the extent of festivals and whether they have been incorporated into regeneration strategies
2. assess the economic impact of festivals on specific places, in light of the hypothesis that festivals are a mechanism to encourage rural and regional economic revitalisation
3. examine the social and cultural impacts of rural and regional festivals.

This report summarises results from our project, including detailed breakdown of our database of nearly 3000 festivals, analysis of results of surveys completed by 480 festival organisers, and insights provided by dozens of individual festivals and communities who participated in the research.

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Boorowa Irish Woolfest *Photo: Peter Sykes*

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EXECUTIVE SUMMARY



Gumbangerri Sunrise Band, busking at the Tamworth Country Music Festival, 1997 (Photo: Peter Dunbar-Hall)

This report summarises findings from the four-year Australian Research Council (ARC) funded Festivals Project, which sought to document the extent and significance of festivals for rural communities and economies.

The largest ever database of rural festivals in Australia was compiled with more than 2,800 included festivals. Through subsequent postal surveys (with 480 festivals in NSW, Victoria and Tasmania) and collaborative research partnerships for qualitative research with a small, selected number of rural festivals, insights were gleaned on the ability of festivals to catalyse social and community development, to generate regional income and to challenge or sustain rural cultural identities.

Festivals are diverse. Results from our database demonstrate that festivals are highly diverse. The most common were sporting, community, agricultural and music festivals. These categories alone make up 75% of all festivals in non-metropolitan areas. There was also great diversity within these categories of festival types. We documented thousands of tiny festivals, regional flagship festivals as well as a few 'mega-events' with audiences of 50,000 or more.

Where is Australia's festival capital? Ballarat is Australia's non-metropolitan 'capital' of festivals, with 73 festivals staged in the period covered by our database. In NSW, Snowy River, Taree and Wollongong all staged over 50 festivals in a calendar year. In Tasmania, West Tamar was a festival heartland with 20 festivals.

Small places party hard. When measured by head of population, very small places had

the distinction of hosting more festivals in a relative sense: Wakool in the NSW Riverina, with a population of only 4800, hosted 22 festivals in 2006–2007. Other towns in NSW with high numbers of festivals per capita included Narrandera, Tumbarumba, Barraba and Bombala. In Victoria, the tiny Towong and Buloke Shires, with 6000 residents each, had more festivals per capita than anywhere else in that state. In Tasmania, King Island, Central Highlands and Break O'Day topped the per capita festivals list.

Most festivals were small. The average attendance at festivals was 7,020 – but results were variable. Two festivals in Geelong – the Pako Festa and the Geelong Show – both claimed audiences of 100,000 people and the Victorian Seniors Festival, actually held in many locations at different times throughout the state, claimed an attendance of 400,000. By contrast, the tiny Summit to the Sea endurance cycling festival had a mere 15 participants. 138 festivals (29%) had audiences of fewer than 1,000 people; two-thirds had fewer than 5,000. Only 11 festivals (just over 2%) had audiences of more than 50,000. Festivals surveyed were held for an average duration of 3.3 days and had an average of 67 stalls (including food, clothing and merchandise).

Most festivals were local in orientation. On average 58% of attendees across the festivals surveyed were from the immediate locality; 10.5% were from the state capital (Sydney, Melbourne or Hobart); 20.9% were from elsewhere in the state (notably, this was double the result for capital cities); 8.3% from interstate; and a tiny 1% on average were international visitors. In total 91 festivals reported that 90% or more of their audiences came from their immediate vicinity.

Not for profit. The vast majority (74%) of festivals were run by non-profit organisations. Only 3.3% of the festivals surveyed were run by private sector/profit-seeking companies. Reflecting this, the stated aims of festivals were more often than not linked to the pastimes, passions or pursuits of the individuals on organizing committees, or to socially- or culturally-orientated ends such as building community, rather than as income-generating ventures. It came as little surprise, then, when festivals on the whole recorded small funding bases, limited turnovers, and frequently only just broke even or made very modest profits.

Cumulatively a substantial industry. Although most festivals were small, not-for-profit and did well to earn a modest profit, the sheer number and distribution of rural festivals makes them a sizeable industry in a cumulative sense. We estimate total turnover by festivals (through ticket

sales and merchandise) in the three participating states to be \$550 million annually. Added to this is the fact that even when festivals don't make much money through ticket sales, they generally catalyse much greater economic benefits for the local community through flow on benefits in sourcing inputs, hiring services, and attracting visitors who stay in hotels and motels, eat out and go shopping. Festivals are lively cells of economic activity, particularly so in small local economies where their relative impact is greater than in urban areas. Based on extrapolating from close economic modelling of visitor expenditure at individual festivals, we estimate total economic activity generated by rural communities for their local communities to be in the order of \$10 billion per annum in the three participating states.

Job creation. Overall, using actual employment numbers gained from our survey, and extrapolating this for our full database of festivals across the three states, it is estimated that 176,560 full-time and part-time jobs are created directly in the planning and operation of cultural festivals in regional Australia (4.1 full-time and 5.1 part-time jobs per festival in the planning stage; 13 full-time jobs and 12.6 part-time jobs on average created at the time of operation). The most common were event managers/directors/coordinators (25% of jobs created), administration and accounting positions (24%), ground-keepers, ground staff and facilities managers (12%), public relations, promotions and marketing positions (9%) and artistic services (including artists, artistic and musical directors – 8.5%). In addition to these figures, organisers claimed that on average another 27 directly related jobs (over 77,000 in total) were created by their festivals in the wider community. Actual conditions and length of employment generated by festivals obviously vary enormously and need to be acknowledged. But in overall terms, festivals are deceptively effective creators of local jobs.

Volunteerism. Festival organisers surveyed estimated that 19.2 days were spent by the average volunteer assisting their festival during its planning phase, and 5.7 days on average assisting during the running of the event at time of operation. Across the 480 surveys this constituted the equivalent of over 8,600 days (or 23 years' worth of labour) when adding up the work done *by the average volunteer* across all festivals in that given calendar year. The magnitude of this can then be multiplied by the factor of number of volunteers actually contributing at each festival. Assuming the average festival has 5 volunteer workers, then 355,570 days' worth of labour (equivalent to 975 years) was provided in total

across all 2856 festivals in the three states. Cultural festivals are thus deeply embedded in local economies through volunteerism.

Audience development. Advertising and marketing strategies have become more complex over time. Most festivals still use some form of traditional media to reach audiences, particularly advertising in local newspapers, although it is only large festivals that can command television advertising space. Increasingly the internet is considered important, and festival websites (such as those run by the Tamworth Country Music Festival and Deniliquin Ute Muster) can be impressively detailed and sophisticated. But even modest festivals now have websites – even if basic – and these are vital to extending audiences beyond a local catchment. There was some evidence in our survey data and from interviews that festival organisers are paring back some forms of traditional media and instead are either cultivating word-of-mouth strategies, or developing more sophisticated direct marketing campaigns that involve database records of contacts, mailing lists and relationship-building with repeat visitors.

Environment. Most festivals do not have to complete environmental impact statements or develop environmental management plans. However, the number of festivals trading on their 'green' credential is on the rise. Carbon emissions from festivals are comparatively low on a per capita attendee basis, which is good news for festival organisers. However, transport-related carbon impacts remain disproportionately high. A key challenge will be finding ways of reducing car dependency for future events.

Community. It is a truism to say that festivals build community – but it is worth highlighting the extent and functions of festivals in local communities, and especially in small places. We documented evidence of the integration of festivals into community life. Festivals are pivotal dates on the annual calendars of towns and villages: they support charities and provide opportunities for high schools and Rotary clubs to raise funds; they bring together scattered farm-folk, young and old and disparate subcultures; they blend attitudes, enlargen social networks and encourage improvements in social cohesion. We documented some evidence of community division over festivals, and the jostling of political viewpoints that inevitably surrounds a community event of importance to a local place. But such tensions were on the whole rare. Festivals provide rural communities with coping mechanisms at times of drought and economic hardship, and catalyse community in the name of fun.

WHAT WE DID



ChillOut Festival, Daylesford Photo: Chris Gibson

This research project was undertaken in three phases: the first was the compilation of a database of festivals, for three Australian states – Tasmania, Victoria and New South Wales – including information on the festival’s name, aims, organisers, location, marketing material, date and frequency. Festivals were located mainly by using Internet search engines, and running detailed queries by keyword for every local government area (LGA) in the three states. Official local council calendars of events were located for every LGA where one was available, and festivals from them included where appropriate. Also, tailored keyword searches were run for niches (e.g. for particular styles of music), for common festival types (e.g. food and wine festivals) and for more specific activities associated with subcultures and other groups (e.g. ‘hot rod’ car shows, seniors festivals, gay and lesbian festivals, goth festivals, a long list of specific sports festivals by type of sport). In addition to these methods, festivals were also located via print media (including regular scanning of metropolitan broadsheets), regional tourism brochures and festival-specific flyers.

What is a festival?

Much debate ensued amongst the research team over what constituted a ‘festival’. A clear demarcation was made between infrequent, usually annual events, which could be included (pending other criteria), and regular, recurrent events held often through a calendar year (such as weekly sports meets), which were not included. Conferences, conventions and trade exhibitions were excluded. Events that were likely to have taken place anyway, irrespective of their being branded as a ‘special event’, were generally not included (examples of this were live music nights held at regular live music venues, but billed as ‘special’ in some way purely for marketing purposes). To qualify for inclusion as a festival, an event had to meet at least one (and preferably more than one) of the following criteria: use of the word ‘festival’ in the event name; it being an irregular, one-off, annual or biannual event; emphasis on celebrating, promoting or exploring some aspect of local culture, or being an unusual point of convergence for people with a given cultural activity, or of a specific subcultural identification.

What is ‘rural and regional Australia’?

We took an inclusive view of what constituted rural and regional Australia: it included all areas of NSW and Victoria outside Sydney and Melbourne, and all of Tasmania. The decision

Numbers of festivals, by type, Tasmania, Victoria and NSW, 2007-2008

Type of festival	TAS	VIC	NSW	TOTAL**	% of total
Sport	86	485	488	1059	36.5
Community	45	216	175	436	15.0
Agriculture	19	146	215	380	13.1
Music	13	116	159	288	9.9
Arts	12	73	82	167	5.8
Other*	7	87	71	165	5.7
Food	10	53	67	130	4.5
Wine	7	49	32	88	3.0
Gardening	20	43	14	77	2.7
Culture	2	21	11	34	1.2
Environment	1	8	12	21	0.7
Heritage/historic	4	8	7	19	0.7
Children/Youth	0	10	5	15	0.5
Christmas/New Year	0	10	2	12	0.4
Total	226	1325	1340	2891	100

* The Other category includes small numbers of the following festival types: Lifestyle, Outdoor, Science, Religious, Seniors, Innovation, Education, Animals and Pets, Beer, Cars, Collectables, Craft, Air Shows, Dance, Theatre, Gay and Lesbian, Indigenous, and New Age.

** The total for this table is slightly more than the total number of festivals in the database, due to counting of some festivals in more than one category. This occurred when separating categories proved impossible (for example, for ‘food and wine festivals’)

to include Hobart, although it is a capital city, was based purely on demography, it having a comparable population size to Wagga Wagga and Mildura – which were also included. We limited our searches to three states – NSW, Victoria and Tasmania. Limitations of research funding meant that a full national study could not be mounted. Nonetheless, inter-state comparison was deemed preferable to gauge whether differences in cultural and arts policy, tourism promotion and event regulation affected the extent of festivals. The three states were selected given their differences in size and population, and proximity to each other – constituting the south-eastern states of Australia.

How many festivals did we find?

A total of 2,856 festivals were identified by this methodology (211 for Tasmania, 1189 for Victoria, 1456 for NSW), and were thus included in the database.

From the records of 2,856 festivals, the second phase of the project ensued. This was a detailed survey, sent to festival organisers where an identifiable organization or individual's name, postal or email address was publicly available (and thus included in our database). The total number of festivals satisfying these conditions was 1,718. The 8-page survey sought to inform all three of the project's main aims, and specifically the extent to which festivals have been incorporated into economic development and regeneration strategies. It asked organisers a range of questions on their event's aims, history, crowd size, stalls and stages, the geography of attendees and inputs, target markets, organizational structure, employment, volunteerism, sponsorship and advertising, community attitudes, and estimated economic impacts. Where postal addresses were available (in 1,027 cases), organisers were sent a paper-copy of the survey, with explanation cover sheet and a return pre-paid envelope. Where only email addresses were available for organisers (691 cases), they were sent an email explanation letter, requesting that the survey be completed online (with identical questions and format). Reminder letters were sent via both means to festival organisers after 4 weeks. A total of 480 completed surveys were received from festival organisers. This represented a 28 percent response rate overall (38 percent for paper surveys sent, versus 13 percent for email requests).

Is the devil in the detail?

The third phase of the project was the examination of a series of in-depth case studies across two states (NSW and Victoria). Case

Survey of festival organisers – sample, returned survey numbers, response rates

	Paper surveys posted	Paper surveys returned	Email requests sent	Online surveys returned	Total sent	Total returned
Tasmania	93	38	83	12	176	50
Victoria	359	152	294	35	653	187
NSW	575	202	314	41	889	243
Total	1027	392	691	88	1718	480

Returned surveys – numbers by type of festival (and comparison to database distribution of festivals by type)

Type of Festival	NSW	Vic	Tas	Total*	% of total returned surveys	% of database total
Sport	63	52	13	128	17.8	36.5
Community	66	50	12	128	17.8	15.0
Agriculture	71	35	5	111	15.5	13.1
Music	54	31	7	92	12.8	9.9
Arts	44	25	14	83	11.6	5.8
Food	19	19	6	44	6.1	4.5
Other	15	18	3	36	5.0	5.7
Gardening	12	16	5	33	4.6	2.7
Wine	14	13	4	31	4.3	3.0
Environment	8	3	1	12	1.7	0.7
Heritage/Historic	3	4	2	9	1.3	0.7
Culture/Ethnicity	4	2	0	6	0.8	1.2
Children/Youth	0	3	0	3	0.4	0.5
Christmas/New Years	0	2	0	2	0.3	0.4

* The total number of festivals by type is greater than the total number of surveys received. Festivals that recorded more than one type are counted for each of these records.

studies involved close analysis of economic impacts via visitor and business surveys at the Elvis Revival Festival in Parkes, in inland NSW and at ChillOut, Australia's largest rural gay and lesbian festival, held in Daylesford, Victoria. At these two case studies, issues of social and cultural complexity were also investigated via interviews with organisers, community representatives and local politicians, archival searches, media analysis and participant observation. Additional case studies were pursued elsewhere based on theme (for example, cultural identity at Brigadoon; issues of environmental sustainability at Splendour in the Grass in Byron Bay, NSW) or region (qualitative, semi-structured interviews with organisers were held for multiple festivals in both the New England and Far South Coast regions of NSW). Detailed analysis of case studies is beyond the scope of this report (see "References", page 34).

THE DIVERSITY OF RURAL FESTIVALS



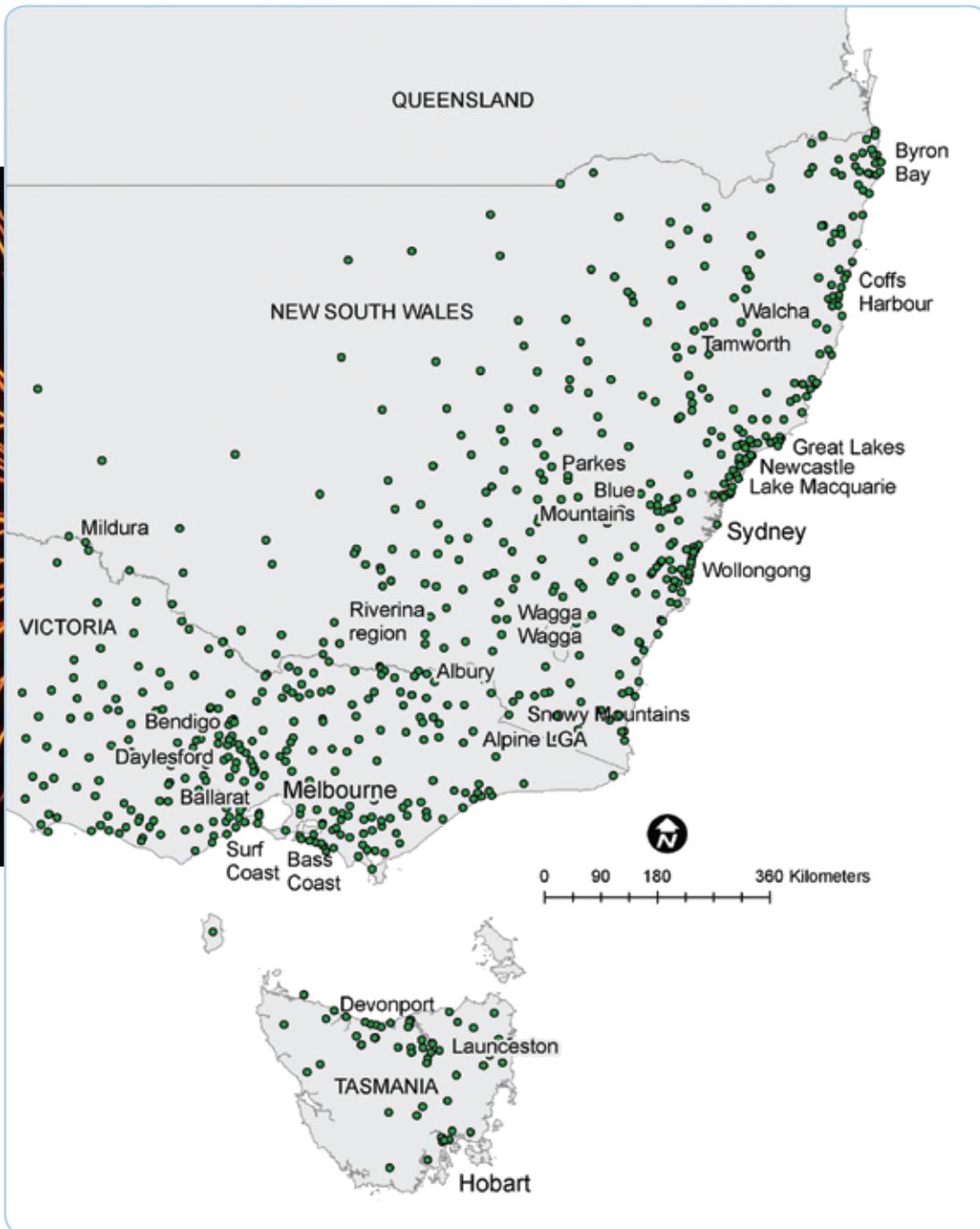
Tumut Festival of the Falling Leaf *Photos courtesy of Tumut Shire Council*

Results from our database demonstrate that cultural festivals are both numerous, and kaleidoscopically diverse, throughout non-metropolitan Australia. The most common were sporting, community, agricultural and music festivals – which combined made up three-quarters of all cultural festivals in non-metropolitan areas. Even though these festival types dominated, within these there was further diversity. ‘Community’ festivals covered everything from Grafton’s historic Jacaranda Festival (named after the town’s signature tree) to Kurrajong’s Scarecrow Festival, Nimbin’s Mardi Grass (a marijuana pro-legalization festival), Ballarat’s Stuffest Youth Festival, Ettalong’s Psychic Festival, Tumut’s elegant Festival of the Falling Leaf, Queanbeyan’s Festival of Ability, and Myrtleford’s Tobacco, Hops and Timber Festival. Similarly varied were sports festivals, covering everything from fishing to billy carts, cycling, pigeon-racing, hang gliding, track and field events, horse racing, basketball carnivals, ski races, dragon boat racing and camp drafting.

In music, country, jazz, folk and blues festivals counted for over half of all music festivals – far outweighing styles such as rock that are more commercial or lucrative in the wider retail market for recorded music (see Gibson 2007 for extra detail). In the sphere of the arts, film festivals, generic ‘arts festivals’, visual arts (usually painting, occasionally photography, and

only once sculpture) and art and craft festivals dominated. Overall, music and arts festivals were more ‘vernacular’ than ‘elite’: sewing and quilting festivals were as common as opera festivals; country music was more prevalent than jazz (although the latter is remarkably widespread, given that it is otherwise a niche of the recorded music market), and also present were other ‘roots’ music styles such as bluegrass and folk. By numbers of attendees, music festivals were amongst the largest of all festivals, including Tamworth’s annual country music festival, Tweed Heads’ ‘Wintersun’ Rock and Roll/1950s nostalgia festival, Goulburn’s Blues Festival, Lorne’s ‘indie’ Falls Music Festival, Byron Bay’s East Coast Blues and Roots Festival and Splendour in the Grass. Audience sizes at these were in the range of 15,000 – 100,000 people.

By contrast, the vast bulk of the festivals surveyed as part of this research were comparatively small. The average attendance at festivals was 7,000, but actual results were quite variable. Two festivals in Geelong – the Pako Festa and the Geelong Show – both claimed audiences of 100,000 people and the Victorian Seniors Festival, actually held in many locations at different times throughout the state, claimed an attendance of 400,000. By contrast, the tiny Summit to the Sea endurance cycling festival had a mere 15 participants. 138 festivals (29 percent) had audiences of fewer than 1,000 people; two-



This map shows the location of festivals in our database across the three states included in the research project

thirds of all festivals had fewer than 5,000 (hitting a high of over 80 percent of sports festivals with audiences under 5,000). Only 11 festivals (just over 2 percent) had audiences of more than 50,000; four of these were agricultural shows and another four were music festivals. Visual arts festivals were the most likely to have audiences of over 10,000 (a function of many of them using an exhibition/gallery format with sustained audiences over consecutive days or weeks).

Geographical patterns were also revealed. LGAs with the most festivals tended to be large regional towns outside capital cities (Ballarat, Newcastle, Geelong, Wollongong, Mildura, Wagga Wagga, Launceston, Bendigo, Devonport), regions reliant upon tourism industries (Snowy River, Alpine, Coffs Harbour, Surf Coast) or coastal 'lifestyle' regions with mixes of tourism and retiree in-

migration (Lake Macquarie, Bass Coast, Great Lakes). Several of these are within 'day tripper' driving distance of Sydney and Melbourne (e.g. Blue Mountains). A different pattern emerged when comparing the number of festivals in a town or region, with its residential population. This measure reveals 'per capita' type trends – useful for understanding which localities and regions host more than the typical number of festivals given their population base. Many of the places with highest festival-per-population scores were in inland areas, not necessarily known for tourism, or proximate to capital cities. Several towns and villages in the Riverina region (surrounding the Murray River in NSW and Victoria) made the list, including Wakool, Narrandera, Holbrook, Jerilderie; while settlements in and around the Snowy Mountains also



Chocolate Winterfest, Latrobe Photos: Michelle Dutton

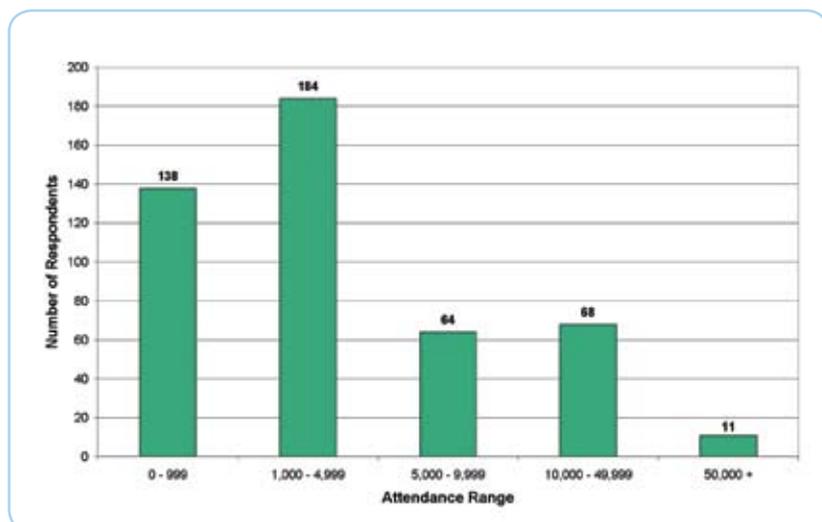


featured (Snowy River, Towong, Tumbarumba). Other festival-rich regions included the eastern goldfields of Victoria and southern coastal NSW. Such patterns are likely a function of available transportation, extent of orientation to the tourism industry, proclivities of local residents to get out and support festivals in their home town, central support from councils with employed festival and event officers, and regional ‘contagion’ effects (where neighboring towns gain inspiration or steal ideas from each other).

Other key facts and figures from our survey include:

- A significant proportion of festivals (91.5 percent) occurred annually. Only a small percentage of events occurred biannually (i.e. twice a year – 3.1 percent); biennially (i.e. every second year – 1.2 percent) and triennially (0.6 percent).

Attendance at surveyed festivals, by number of festivals



- The average length of festivals was three and a half days. 45 percent were 2-3 days in length, typically weekends. 36 festivals were 10 days or longer, and within this was diversity: three very large music festivals (the longest running for over two months); six sports festivals all with small crowd sizes, as well as youth and visual arts festivals, film festivals and a horse festival.
- A third of the festivals surveyed were part of a wider network of events. Of these, about a third (56 festivals) were part of a regional circuit or calendar of events (usually coordinated by local council and/or the local tourism office); and another third were incorporated into national associations or formed part of a national circuit or calendar. 20 percent were part of a string of events organised by local associations (such as agricultural shows that are connected to a district or regional agricultural and pastoral society) and 15 percent were linked to an umbrella festival which either covered a region where multiple events were held in multiple locations (frequently such events as writers festivals or senior citizens’ weeks), or where a smaller festival was associated with a larger, broad scale umbrella event in the same location.
- Just under half of all festivals were ticketed events (46 percent). A third featured a mixture of ticketed and free events (33 percent), while only a small percentage were totally free events (12 percent).
- The average number of venues per festival was 16, although again there was substantial diversity, with many using only one venue, and one even claiming to use 3,000 venues.

FESTIVAL CAPITALS: Top 20 LGAs by number of festivals, and festivals per 10,000 population, Tasmania, Victoria and New South Wales, 2007 (based on 2006 census data population counts)

Top 20 by number of festivals

LGA	Population	Festivals	Festivals per 10,000 population
Ballarat (Vic)	80045	73	9.12
Snowy River (NSW)	18737	62	33.09
Alpine (Vic)	17806	60	33.70
Greater Taree (NSW)	42943	55	12.81
Lake Macquarie (NSW)	177619	54	3.04
Greater Geelong (Vic)	184331	52	2.82
Wollongong (NSW)	181612	50	2.75
Hobart (Tas)	47321	48	10.14
Mildura (Vic)	48386	44	9.09
Warrnambool (Vic)	28754	43	14.95
Greater Bendigo (Vic)	86066	43	5.00
Delatite (Vic)	21833	42	19.24
Shoalhaven (NSW)	83546	40	4.79
Wagga Wagga (NSW)	55058	36	6.54
Surf Coast (Vic)	19628	36	18.34
Greater Shepparton (Vic)	55210	35	6.34
Bass Coast (Vic)	24076	34	14.12
Great Lakes (NSW)	31388	33	10.51
East Gippsland (Vic)	38028	33	8.68
Mount Alexander (Vic)	16174	31	19.17

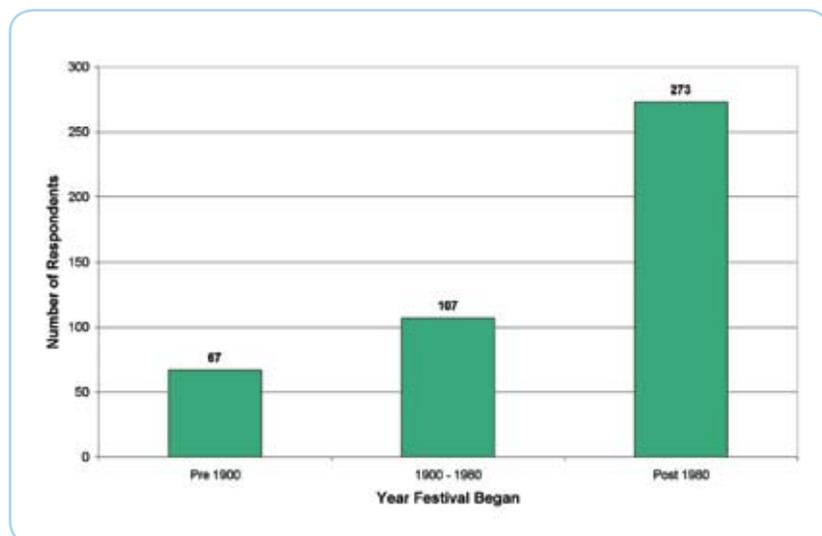
Top 20 by festivals per 10,000 population

LGA	Population	Festivals	Festivals per 10,000 population
Wakool (NSW)	4807	22	45.77
Towong (Vic)	5972	23	38.51
Buloke (Vic)	6982	26	37.24
Narrandera (NSW)	6485	22	33.92
Tumbarumba (NSW)	3551	12	33.79
Alpine (Vic)	17806	60	33.70
Snowy River (NSW)	18737	62	33.09
Barraba (NSW)	2138	7	32.74
Queenscliff (Vic)	3078	10	32.49
Bombala (NSW)	2469	8	32.40
Holbrook (NSW)	2340	7	29.91
King Island (Tas)	1688	5	29.62
Nundle (NSW)	1351	4	29.61
Strathbogie (Vic)	9171	24	26.17
Merriwa (NSW)	2337	6	25.67
Pyrenees (Vic)	6360	16	25.16
Tallaganda (NSW)	2637	6	22.75
Jerilderie (NSW)	1786	4	22.40
Coolah (NSW)	3682	8	21.73
Ararat (Vic)	11102	24	21.62

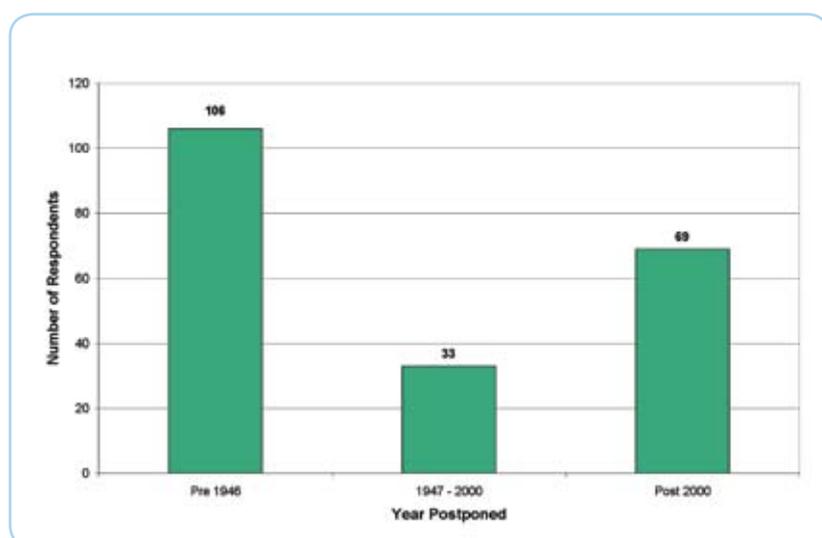
Multiple venues within individual festivals were commonplace among music, food and wine and community events, including hotels and clubs, community halls, restaurants, sporting ovals and other public open space areas.

- There were 67 stallholders per festival, on average – again with wide variation. Many festivals had no external stallholders, instead offering food, drink and merchandise internally. 17 percent had 10 stalls or less and just over a fifth had between 11 and 30 stalls. 20 percent had 50 or more stalls. There was a notable group of 23 festivals, half of which were agricultural shows, featuring over 200 stalls (a music festival topped the list with an estimate of 2500 stallholders). All but one of these large festivals (in terms of numbers of stallholders) were long-running festivals, with an average year of commencement of 1956, of which five dated back to the nineteenth century.
- Most festivals remain in the same location year to year (90 percent) and use the same venues year in, year out (74 percent). Only 6 percent involve a major change in venue, and 7 percent move locations altogether. Where this was the case, it was often a simple function of the nature of the festival (such as sporting carnivals which rotate their locality each year, allowing competitors the ability to compete in home and away situations). A small number of respondents indicated community, regional based events changed venue across different towns within the same region, to disperse benefits.
- An average (mean) of 64 performances and events were held within each festival, and again, this varied enormously. The median (middle-ranking) number of performances was only 10, much less than the average measured as mean, because six festivals (all music and community festivals) recorded more than 1,000 performances within their overall event, with another 10 percent of the total sample listing more than 100 events per festival. This small group of festivals heavily skewed the overall averages. About half of the sample were festivals with less than 20 events or performances within their programs.

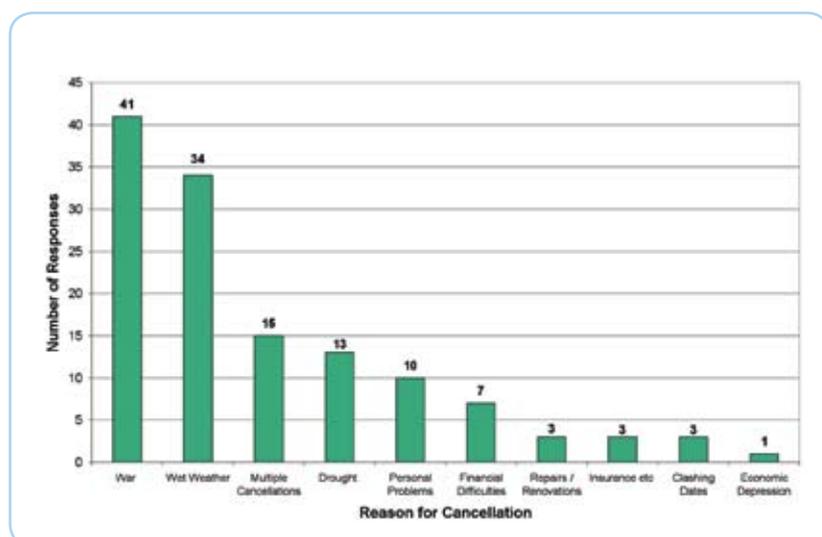
A LONG HISTORY – AND A MASS OF NEWCOMERS



In what year did your festival begin?



Number of cancelled events, by years in which the festival was cancelled



Reasons why festivals were cancelled

Festivals with a wide range of histories returned surveys. 67 festivals (15 percent) had been running since before 1900. These were mostly gardening and flower festivals (a mainstay of Australian country life), and agricultural shows, traditionally focused around harvest, produce, livestock and new farming technologies and techniques (and with some forms of rural entertainment like boxing tents and rodeos). In the post-war period agricultural shows became much larger, cultural festivals featuring live music (often country music), entertainment, fairground rides, showbags (bags of toys and sweets usually bought by or for young children) and commercial stalls. Many agricultural shows have closed down or amalgamated with those in neighbouring towns; those that survive are either very large (generally the largest single event in the year of the town) or have found other ways to remain relevant, including niche marketing and hiring big name music acts. Many traditional shows have lost exhibitors too – to industry-focused agricultural equipment trade fairs, and to outdoor, caravan, camping and boat shows which compete for the public interest. In contrast to agricultural shows, most other festivals had their genesis in the past 30 years. Only 24 percent of surveyed festivals began between 1900 and 1980. By contrast, 61 percent began after 1980, and over a third of these began after 2000. The novelty of festivals was even more apparent for particular types such as music (88 percent began after 1980) and food and wine festivals (84 and 87 percent respectively began after 1980).

30 percent of festivals surveyed had been postponed or abandoned at some point in their history. For those festivals with a longer history such as agricultural shows and gardening fairs events were postponed or abandoned during periods of war. Of the 130 festivals who gave reasons for cancellation or postponement, 32 percent experienced cancellations due to war, 26 percent experienced cancellations due to wet weather, 10 percent due to drought, 8 percent due to personal problems and 5 percent due to financial difficulties. Only a small number of festivals experienced cancellations due to clashing dates, repairs/renovations, insurance costs and economic depression (8 percent combined). Interestingly, cancellations have increased since 2000, after a sustained period without interruptions between 1946 and 2000. Main reasons for this were wet weather and drought – see section “Coming together in hard times – festivals in drought-affected communities”, page 30).



Interview with Don Murchie, Walcha Show

"My family have been involved in the show organisation for generations. In fact there's a plaque over there (points behind us) that I've got to find a new home for. That belongs to my grandfather, who was also the show secretary and he actually died on the job unfortunately. I hope that doesn't happen to me! Most of the shows started off as... (pauses) I think there was a little bit of an ulterior motive in a lot of it; whose got the best draught horse, you know? Whose got the best bull? There was a little bit of this competitive edge, that's my understanding of it, the genetics of the show movement was to grow the biggest pumpkin and the best collection of apples or whatever. My old grandfather notoriously planted an orchid just to get a collection of fruit for the show. It was a very competitive thing, as much as a social thing. But of course there was the social aspect.

"I've been involved in the show, the Walcha show, ever since I was a school kid, and I worked my way up through the ranks I suppose. I ended up as chief steward for

21 years. I've known the shows pretty well. I believed that if you took a job on, you do it. And so, I used to attend as many of the shows in our region as I could and got to know the people involved, how they function, the ones that are strong, and the ones that are cracking up (laughs). And on that score, in our group, I maintain that Glenn Innes is the strongest. They have a very active show committee and they actually hold ballots for their committee of 80; that gives you an idea of how active they are. Whereas here (in Walcha), we have a maximum of 80 (committee members) but we never had a ballot.

I believe that part of the problem with [agricultural shows in] the bigger centres is that there is no community of interest. There is not the community of interest like there is in a small town, and what holds Walcha together and makes it so strong, and definitely in Glenn Innes, is the community of interest. Everyone puts in to help with the show. The show and the races are an opportunity for people to

get out and meet their community. We've lost to a certain extent the communities that we used to have. Years ago, a festival would have been a great event, because you couldn't get to Walcha very easily you know. The roads were disastrous and the vehicles, or even before the vehicles, the horse were slow and so you had this community [bounded by geography]. That's gone now because of the good roads and the good cars. I believe that the smaller communities are now relying on the shows and the races to rebuild that community interest, that local interest.

A LOCAL STORY



High and Dry Festival, Wilberforce Photo: Elyse Stanes

...the stated aims of festivals were... linked to the pastimes, passions or pursuits of the individuals on organizing committees, or to socially- or culturally-orientated ends such as building community...

At the start of our project, it was our expectation that most festivals would be operating as tourism ventures, seeking to attract audiences from elsewhere other than their local community. While this is true in many cases, we also found that festivals were quite local in orientation –

much more than was expected. The story is of many thousands of comparatively tiny festivals serving towns and villages as points of celebration, community and identity, drawing on local expertise and volunteers, and supporting small businesses from their immediate area. Every weekend across non-metropolitan

Australia there are literally hundreds of small festivals and events taking place in community halls, showgrounds, public parks, pubs and auditoriums. Most are modest, advertise locally, and are unknown anywhere else. Individually, events can be tiny even to the point of apparent insignificance. But envisaged cumulatively, festivals are a vibrant, ever-present grass-roots community activity.

Across the festivals surveyed, 59 percent of attendees were on average from the immediate locality; 11 percent were from the state capital (Sydney, Melbourne or Hobart); 21.5 percent were from elsewhere in the state (at double the rate from capital cities); 8 percent were from interstate; and a tiny 1 percent on average were international visitors. In total, 91 festivals reported that 90 percent or more of their audiences came from their immediate vicinity. In comparison, only one festival reported that 90 percent or more of their audience were from capital cities, and only six festivals reported that 90 percent or more of their audience came from elsewhere in their state.

Reflecting this, the stated aims of festivals were more often than not linked to the pastimes, passions or pursuits of the individuals on organizing committees, or to socially- or culturally-orientated ends such as building community (75 festivals, or 16 percent), rather than as income-generating ventures. Indeed, of all categories of festival aims, 'to make money' and 'to increase regional income' were the two rarest responses (recorded in only 5 percent of cases, combined). Promoting or showcasing a region or locality was the aim of 77 festivals (or 14 percent of all stated aims), in addition to another 50 festivals (10 percent) based around celebrating or showcasing local produce (exclusive of agricultural shows, which separately counted for 80 festivals, or 15 percent of all stated aims). Social and/or cultural goals such as celebrating local culture, heritage, cultural diversity, the environment, Aboriginal culture, sustainability and health were recorded by 60 festivals (or just over 10 percent of all stated aims). There were also some variations in aims by festival type: sports festivals were predictably more likely to list 'competing' as the premier aim and environment festivals unsurprisingly listed 'to educate' as their highest priority. Music festivals were more likely than others to list 'increasing regional income' as an aim – but even then, it was only a distant eighth, well behind 'fostering and encouraging talent', 'building community', 'celebrating and entertaining' and others. Of those festivals with audience sizes larger than 50,000, none listed 'building community', 'celebrate' or 'educate' as their aim (instead choosing 'to entertain' and 'to promote a place/ theme/ activity'). Reflecting that sports festivals were on the whole small, the most common aims of those events with audiences less than 1,000 people were 'to compete', and 'foster and encourage talent'.

Nearly three-quarters of all festivals surveyed said that their local council supported or promoted their festival. This support was largely

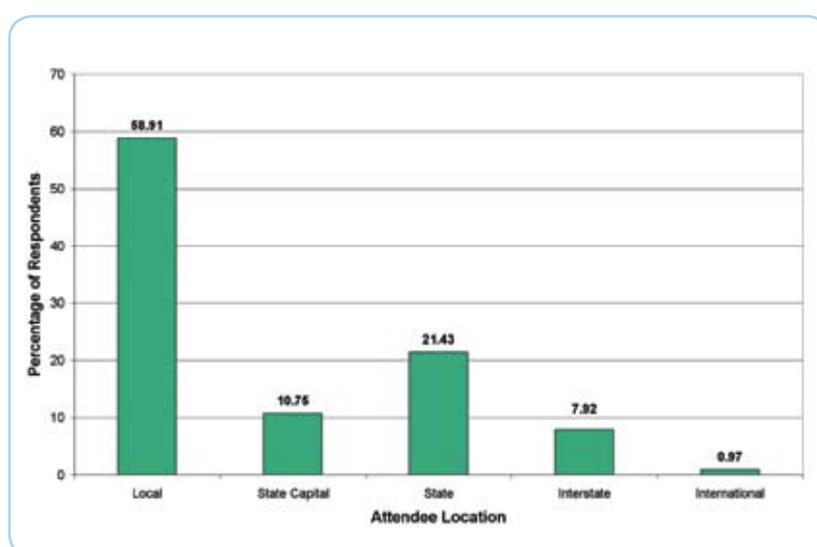
provided through advertising (62 percent) which predominately took the form of listing on councils' events calendars and websites. 38 percent of those festivals which did receive Council support received financial contributions in some form – largely as small monetary grants. Other less frequent forms of support from local councils included providing staff support, free or subsidised venues, assistance with waste management and coordination of volunteers. Despite three quarters of festivals receiving some form of Council support, and just over a third of these receiving funding, only 24 percent of all festivals indicated they were part of long term economic development strategies. Rarely are festivals positioned by Councils in economic terms or factored into regional economic development strategies and plans.

Some festivals help to redefine the nature of life in the places where they occur. Others build on the life that presently exists. We asked participating festivals to place an 'x' somewhere along a scale to indicate whether their festival builds on existing ways of life or offers something new – or both. Many festival organisers were unsure whether their event built on the existing way of life of the local community or offered something new; 22 percent accordingly marked the mid section of the scale. Responses were not radically distributed at either end of the spectrum, on the whole instead being conservatively placed slightly towards the 'offers something new' end of the spectrum. On balance, a larger percentage of organisers believed their festival offered something new (41 percent) rather than building on the existing way of life (24.5 percent). Only 7 percent of respondents believed their festival both offered something new and built on the existing way of life. Types of festivals that tended to indicate 'offers something new' were music, community, food, film and the miscellaneous 'other' category (which itself contained a wide array of specialist and quirky themes).

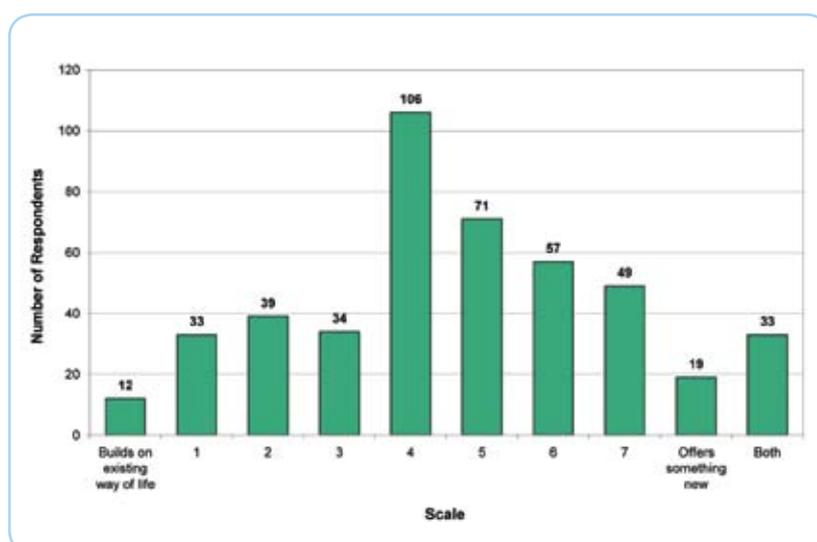
Organisers were also asked to gauge the extent to which their festival was 'reliant on the local environment'. 60 percent of respondents believed their festival was reliant on the local environment either 'quite a lot' or to a 'large extent'; 15 percent believed this was to a 'small extent', while a further 17 percent believed this was to a 'reasonable extent'. Just 6 percent believed their festival was not at all reliant on the local environment. Festivals in rural and regional Australia are deeply connected to geography – they are expressions of local places, as well as local people.

What are the main aims of your festival?

Aim	#	%
To promote a place/theme/activity	137	28.5
To show(case) a place/theme/activity	86	17.9
To build community	75	15.6
To compete	75	15.6
To entertain	65	13.5
To foster/encourage	63	13.1
To celebrate	44	9.2
To fundraise	41	8.5
To educate	21	4.4
To make money	12	2.5
To increase regional income	12	2.5



Where do people come from to attend festivals?



Does your festival build on an existing way of life, or offer something new – or both?

A LITTLE BIT OF MONEY GOES A LONG WAY



Elvis Revival Festival, Parkes Photos: Robbie Begg

Surveys included questions aimed at accumulating information about the economic significance of festivals. Our point was not to definitively measure their dollar value – although we do below explain how it is possible to provide an estimate based on the information we have – but instead to capture some of the broad contours of the economic dimensions of festivals. The academic literature is divided on the best way to capture the economic significance of festivals.

Festivals may make no or little direct profit, but instead they catalyse meaningful monetary benefits for their surrounding communities as a flow-on effect...

Indeed, it is extremely difficult to accurately model the economic impact of even a single festival – let alone several thousand. It was for logistical reasons not possible to undertake a detailed input-output or cost-benefit analysis of every festival in our database or survey. We instead included questions in our

survey for festival organisers about profit or loss, turnover and funding support, worded as plainly as possible, to gauge their economic dimensions.

Overall, festivals recorded small funding bases, limited turnovers and frequently only just broke even or made very modest profits. This reflects the aims of festival organisers (discussed above) which were overwhelmingly not about making money or increasing regional income. 63 percent of festivals had a turnover in the minimum range of \$0 – 50,000, while an even greater percentage of festivals (81.6 percent) received funding support in this smallest range. Only five festivals recorded that they generated more than \$5 million in direct

turnover. It is therefore not surprising that over three quarters (78.4 percent) operated at a loss, broke even or made less than \$10,000 in profit.

An explanation for this is that the vast majority (74 percent) of festivals were run by non-profit organisations. Only 3 percent of the festivals surveyed were run by private sector/profit-seeking companies (these tended to be sport, music and wine festivals). Non-profit organisations were responsible for the majority of festivals in all sizes: 75 percent of those with audiences under 1,000; 77 percent of those between 1,000 and 5,000 and 69 percent of those between 5,000 and 10,000. Even in the larger categories of festivals, non-profit organisations dominated: 77 percent of festivals with audiences between 10,000 and 50,000 and 57 percent of those with audiences of 50,000+ were organised by non-profit organisations. It is clear that generating income is not one of the main priorities of rural festivals; their real purpose is promoting an activity, theme or locality.

This is not to say that festivals cannot generate benefits of an economic nature for their local communities. In 2009, with an estimated attendance of 9,500, the Parkes Elvis Revival Festival brought in \$6 million in direct visitor expenditure (at an average of \$643 per visitor). In 2008, with an attendance of 22,000, the Deniliquin Ute Muster generated direct visitor expenditure of \$13 million (at an average of \$610 per person). Even in much smaller festivals, their relative impact is notable: at the Gromfest youth surf carnival in Lennox Head, Northern NSW, 1200 visitors attended, spending \$472 per person on average. This translated into nearly \$600,000 of spending, injected into the small town over the course of a weekend.

Indeed, herein lies a common characteristic of festivals: their organisers may make no or little direct profit, but instead they catalyse meaningful monetary benefits for their surrounding communities as a flow-on effect – through tourism visitation expenditure, through the hiring of local expertise, and sourcing local services and materials. Benefits are felt most by an array of local small businesses that are functionally connected to the festival, such as cafes and restaurants, sound and lighting equipment hire, waste management, hotels and motels, pubs, printers, advertising agencies, legal services and catering companies.

Based on responses to survey questions about turnover and attendance, and using data generated by close economic modelling of visitor expenditure at festivals in Parkes, Deniliquin, Daylesford and Lennox Head (where audience ranged size from 1200 to 22,000), it



From where do you source the following inputs to the festival?

	Local %	Capital %	State %	Interstate %	International %
Talent	56.5	11.6	20.2	9.6	2
Staff	90.6	4.4	3.2	1.5	0.1
Catering	90.4	2.3	6.5	1.1	0
Stalls	64	6.1	23.9	6	0.3
Staging	84.3	5.7	7.6	2.3	0

was possible to provide estimates for the total dollar value of the economic activity generated by rural festivals in the three participating states. More than \$500 million was generated by festivals themselves in turnover (through ticket and merchandise sales); while using mean visitor spending figures from the detailed case studies (at \$431 per person, excluding festival ticket sales) and attendance breakdowns from survey results, it can be extrapolated that across the 2856 festivals in our database, nearly \$10 billion is generated for local economies.

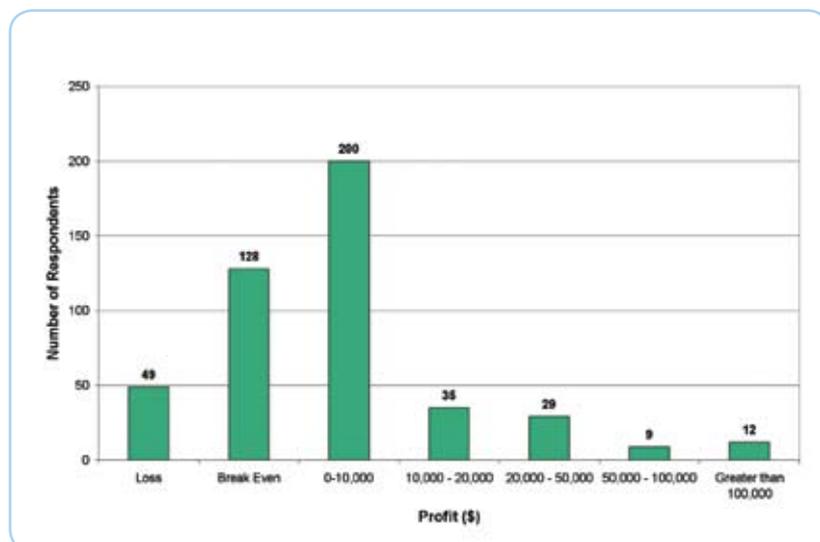
The geography of economic links was further traced by asking organisers about the supply-side inputs to their festivals, and where these were sourced. Although not as fine-grained as multiplier/input-output analysis conducted on individual festivals (again, a logistical impossibility for this research team given the potentially thousands of festivals involved), survey results were able to reveal in broad terms how linked festivals were to local economies. For certain types of inputs, such as staffing, catering and staging and PA equipment, reliance on the local economy was very high; only very small fractions of these inputs were sourced from outside the local economy – meaning likely multiplier effects of festivals were quite high. The story was somewhat different for stallholders and ‘talent’ (musicians, performers, contestants etc): although the locality/surrounding region was still the most common contributor of these inputs to festivals (64 and 57 percent of total inputs in those categories,

respectively), they were somewhat ‘less local’ than for other inputs. This corroborated with interviews with festival organisers undertaken for this project, where a well-established network of itinerant stallholders was revealed. In Australia, itinerant stall-holders travel from festival-to-festival in an annual circuit, earning a living selling food, clothing or other items (to some extent an echo of earlier travelling shows, rodeos, boxing circuits and side-shows). Some festivals we interviewed deliberately excluded such stallholders, for reasons of protecting local businesses and charities (who run the cake stall and merchandise sales) or to exert greater control over what food and merchandise items are offered for sale. Outside capital cities, ‘keeping money local’ is an important priority for festival organisers.

The geography of talent sourced for festivals was less ‘local’ than for other inputs. In part this is inevitable – music and art festivals for instance, are often about importing metropolitan or international ‘headline’ bands, exhibiting travelling works or showing foreign films, especially when local, rather than tourist audiences are the main priority. However, on the whole, festivals are strongly embedded in local economies through supply-side inputs.

Sometimes, well-established festivals deliver other benefits to communities, such as new facilities that can be used year-round. Tamworth is the ultimate example: largely on the basis of its iconic country music festival, Tamworth has received investment in tourism infrastructure, new hotels, museums, a major tourism information centre, and a large regional entertainment centre (securing NSW state government funding). When asked whether their festival has led to new facilities that could be used by local residents, 32 percent disagreed or strongly disagreed – to be expected given that many of the festivals surveyed were tiny and made little money. But in contrast, 50 percent agreed or strongly agreed with the statement. The most common facilities gained included showgrounds (predicted in the case of agricultural shows), and renewed investment in public parks, permanent shade coverings, car parking areas, motels, tourism information centres, and music and performance venues. Food festivals were more likely to simply use existing facilities (often needing little more than a critical mass of existing restaurants and adequate motel and hotel accommodation), whereas environmental festivals were most likely to generate new year-round facilities (often linked to recycling initiatives and other campaigns started at or linked to the festival).

Festival profit or loss – numbers of festivals surveyed, by amount





Dollar value of the economic activity generated by festivals in all three states – estimates based on turnover and visitor expenditure, extrapolated for the full festivals project database

	Surveyed festivals		Estimate of total database		
	# of festivals	% of festivals	# of festivals		\$ turnover (\$million)*
\$ turnover					
0 - 50,000	302	66	1885		471
50,000 - 100,000	64	13.8	394		29.6
100,000 - 250,000	49	10.6	303		53
250,000 - 500,000	21	4.6	131		49.1
500,000 - 1 million	10	2.1	61		45.5
1 million - 5 million	10	2.1	61		182.1
Greater than 5 million	5	1	29		144.5
TOTAL					550.9
Attendance	# of festivals	% of festivals	# of festivals	# of attendees	\$ visitor expenditure (\$million)**
0 - 999	138	30	867	433,500	186.8
1,000 - 4,999	184	40	1156	3,468,000	1494.7
5,000 - 9,999	64	14	404.6	3,034,500	1307.9
10,000 - 49,999	68	15	433.5	13,005,000	5605.2
50,000 +	11	2	57.8	2,890,000	1245.6
TOTAL					9840.2***

* calculations using mid-points in dollar value ranges (e.g. 1885 festivals with an average turnover of \$25,000, which is the mid-point in the first category, \$0-50,000).

** calculations using an average visitor expenditure (excluding ticket and merchandise sales captured above in turnover calculations) of \$431. This was based on averaging modelling at Parkes Elvis Revival Festival (\$442 per person), Deniliquin Ute Muster (\$490), Daylesford ChillOut Festival (\$320) and Lennox Head Gromfest (\$472) – where consistent and comparable methodologies were employed.

*** strictly speaking, this total estimates the economic activity overall generated by rural festivals through visitor expenditure. It does not take into account what proportion of visitors are locals or tourists, and thus it is not possible to infer that this is the total 'tourism impact' of festivals. It also does not take into account the phenomenon of 'time-switchers' or account for how much would have been ordinarily spent by people in the same places outside the time of the festival. Such phenomena are a problem for accounting the new income generated by an individual festival. However, they are of less concern here because the estimate is for all festivals, irrespective of who attends or where they come from.

CREATING PAID EMPLOYMENT



Casino Beef Week Photo: Therese Schier

Select questions addressed the amount of employment directly generated by festivals. It should be noted that questions relating to employment were quite specifically worded to attempt to limit this – asking for the breakdown of full-time versus part-time and fixed term versus year-long work both for organisers themselves, and for other associated staff. Very clear wording asked organisers to estimate directly created full-time and part-time jobs solely for planning, for running the festival on its days of operation, and then separately, how many extra positions were created in related activities (using wording such as “Please note

...across all festivals in the three states included in the study, 99,448 jobs were directly created in planning and running festivals.

that this question relates to the organisation of the festivals, not the performers or the staff that might be working in commercial activities like food outlets. If you are paid, please include yourself in the numbers”). To avoid confusion, no questions were asked about estimating multiplier employment benefits on the demand side. Only supply-side employment impacts based on actual job creation for planning and operation of the festival were interrogated.

Within these parameters, survey results illuminated the quantity and character of employment generated cumulatively by festivals.

Overall, using actual employment results from our survey, and extrapolating this for our full database of over 2,800 festivals across the three states, it is estimated that 176,560 jobs are created in the planning and operation of festivals in non-metropolitan Australia. Breaking the results down, on average 4.1 full-time jobs were directly created in each festival in the planning stage, and 5.1 part-time jobs directly created in the planning stage; 13 full-time jobs and 12.6 part-time jobs were on average created at the time of operation. In other words, across all festivals in the three states included in the study, 99,448 jobs were directly created in planning and running festivals. The most common were event managers/directors/coordinators (25 percent of jobs created), administration and accounting positions (24 percent), ground-keepers, ground staff and facilities managers (12 percent), public relations, promotions and marketing positions (9 percent) and artistic services (including artists, artistic and musical directors – 8.5 percent). Other paid positions created by festivals included retail staff, cleaners, security, catering, judging, stage crew, announcers, and tourism and community development planners.

In addition to these figures, organisers claimed that on average another 27 directly related jobs (over 77,000 in total) were created by their festivals in the wider community (i.e. not employed by the festival itself). Using this evidence to calculate direct employment (in total), festivals appear to produce around 40,000 more jobs in non-metropolitan parts of New South Wales, Victoria and Tasmania than agriculture (in 2006, according to the Australian Bureau of Statistics, all forms of farming combined employed just over 136,000 people in those states). Actual conditions and length of employment generated by festivals obviously vary enormously and need to be assessed critically by economic planners. But in overall terms, festivals are deceptively effective creators of local jobs. While individual festivals would have generated intermittent jobs at the time of the festival, practically all surveyed funded some form of full-time, year-round planning work; while cumulatively, and across the full calendar year in locations with numerous festivals (such as Ballarat, with more than 70 festivals staged annually) it is safe to assume that because of their proliferation festivals sustain year-round employment across a diverse range of support services. In addition, evidence was present that for some labor categories that might seem contingent only on the running of individual festivals – security, sideshow attendants,

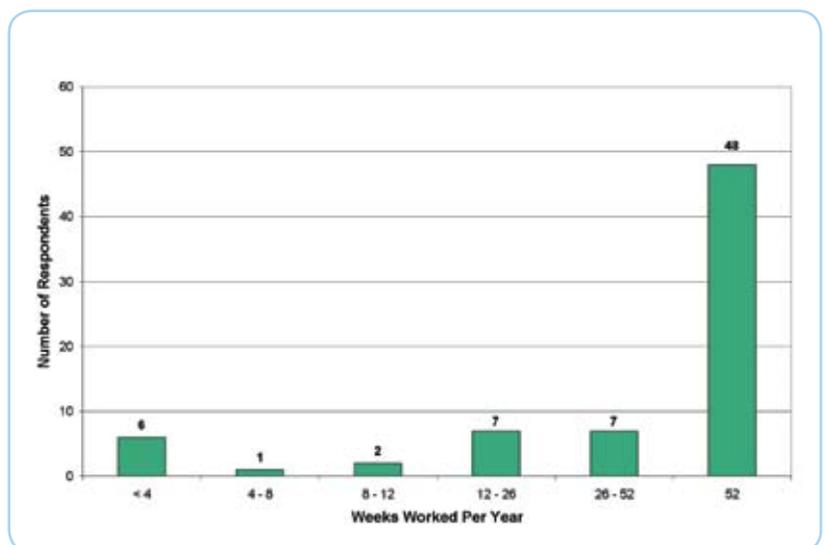


Bundanoon is Brigadoon Photo: Brad Ruting

catering, judging, stage crew, announcers – the actual nature of employment undertaken was more stable and year-round, because people in these jobs travel from town-to-town in a circuit of related festivals on a longer-term, seasonal basis.

Further detail was provided by festivals on the exact nature of the work undertaken by the festival organiser/event manager. 73 percent of festival organisers hold a year long position, either in a full time or part time arrangement. Over half (58.5 percent) said the employment status of the festival organiser was a part time, year long commitment. 52 percent of organisers in this situation were in an unpaid position – again reflecting the extent of involvement of non-profit organisations in festival management. 15 percent of festival organisers worked in a part time, fixed term arrangement. Just 2 percent of organisers worked in a full time, fixed term arrangement. For organisers who held part time arrangements, work hours were predominately 15 hours or less per week spread across the year. Of the 353 respondents who worked part-time organising a festival, 54 percent worked 15 hours or less per week.

As was expected, full-time festival and event managers tended to be employed by larger festivals. The majority of full time festival organisers also worked over a full year long period (rather than on a short-term basis). This reflects the increasing professionalisation of event management. Of the 71 respondents who said they held a full time position, both paid and unpaid, 68 percent worked across the whole year.



Number of weeks worked per annum by full-time festival and event managers

VOLUNTEERS



St Albans Folk Festival Photos: Robbie Begg

Our survey of festival organisers was able to reveal insights into the extent of volunteer support festivals require – an important reflection of their community-building role, particularly in non-metropolitan areas. Actual numbers of volunteers working on each festival were not recorded in the survey due to inherent problems and inaccuracies estimating the numbers of people providing even small amounts of ‘free help’ during festivals. Questions were instead deliberately structured in terms of days’ worth of volunteer help provided. Festival organisers estimated that 19.2 days were spent by the average volunteer assisting their festival during its planning phase, and 5.7 days on average assisting during the running of the event at time of operation. Across the 480 surveys this constituted the equivalent of over 8,600 days (or 23 years’ worth of labor) when adding up

the work done *by the average volunteer* across all festivals in that given calendar year. As with above paid employment estimates this method is less accurate than measuring volunteerism *en situ* at every festival. While that was not feasible, it was possible to extrapolate out from survey figures approximate amounts of volunteer input into the organisation and running of festivals for all non-metropolitan festivals across the three states. Using the above average days-per-festival data, 71,114 days’ worth of volunteer labor (equivalent to 195 years’ worth of labor) was provided in total *by the average volunteer* at each of the 2856 festivals in our database (when added up cumulatively). The magnitude of this can then be multiplied by the factor of number of volunteers actually contributing at each festival. Because this is not known from the survey, it can only be estimated. However, if even modest estimates are made about the numbers of volunteers working on each festival, the resulting numbers on the extent of volunteerism are massive: if the average festival was assumed to have 5 volunteer workers, then 355,570 days’ worth of labor (equivalent to 975 years) was provided in total across all 2856 festivals in the three states; if each had 20 volunteers, the figure was more like 1,422,280 days’ worth of labor (or 3,900 years). Festivals are thus deeply embedded in local economies in a non-monetary sense, through volunteerism.

Volunteers are depended on for the smooth running of festivals. Festival organisers were asked what kinds of activities volunteers undertook. 42 percent of respondents said that volunteers took part in ‘on the day activities’ which includes security, catering, judging, stage crew, marshalling etc. Respondents further specified activities undertaken by volunteers. 37 percent of festivals had volunteers helping in the set up process, 33 percent of festivals had volunteers assisting in the planning and organisation of the event, while significant numbers of festivals also had volunteers assisting with administration (23 percent), catering (19 percent), clean up (19 percent), publicity (16 percent) and working as officials (15 percent). Security (8 percent of festivals) and committee members (5 percent of festivals) were also recorded in the survey.



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SPONSORSHIP AND ADVERTISING: CULTIVATING AUDIENCES



Palm Creek Folk Festival Photo: Robbie Begg

Most festivals we surveyed were provided with some form of sponsorship (84 percent). The most common sponsorship provided to festivals came in the form of either prizes and trophies (67 percent) or advertising (62 percent). Untied monetary grants (40 percent), equipment (36 percent), venue space (33 percent), naming rights (29 percent) and temporary naming rights (29 percent) were also common. Labour was provided to a smaller number of festivals (17 percent).

Advertising is often provided by local councils, who advertise the festival on their events calendar. The story documented above – of localism, reliance on volunteerism and non-profit management structures – is reflected in who sponsors rural festivals. Rural festivals rely on the local community for the running of the event, and for sponsorship, and most commonly it is local businesses who provide sponsorship, prizes and trophies for festival competitions in exchange for naming or badging rights on festival publicity material. Predictably, larger festivals with professional event management staff have been able to negotiate larger

sponsorship deals with larger companies and organisations beyond their locality: ClubsNSW and CountryLink in the case of the Parkes Elvis Revival Festival; Holden and Bundaberg Rum at the Deniliquin Ute Muster; Toyota, Telstra and Gibson Guitars in the case of the Tamworth Country Music Festival. The contrast is stark between the scale of these corporate deals, and the multitude of modest community festivals we surveyed, for whom sponsorship means subsidised use of the council community hall, local shops paying for a trophy or gift voucher as prizes and free publicity in the local newspaper and on community radio stations.

Audience development is a particular concern for festivals. Advertising is ubiquitous. 88 percent of festival organisers said they used newspaper to advertise their event, usually local and community papers. Other significant forms of advertising included posters and signs (76 percent), roadside banners and posters in local shops and eateries. 75 percent of festivals used radio to advertise their event. Mail outs (both postal and email) returned similar response rates, while television and magazines were utilised to a lesser extent. Television is considered too costly for most, and is often not focused towards a small community or region.

The use of websites is a growing method for advertisement, and is now used by 75 percent of festival organisers. Some larger festivals such as the Byron Bay East Coast Blues and Roots Festival and Deniliquin Ute Muster have developed sophisticated websites; in the case of the Tamworth Country Music Festival, the strategy has been to cram it full with information and to invite festival fans to participate in various ways in an online community surrounding the festival – a particularly advanced strategy. By contrast, there are thousands of basic websites for small, poorly-funded festivals that nonetheless still convey crucial information. Websites are becoming compulsory if the aim is reach to audiences beyond the immediate vicinity.

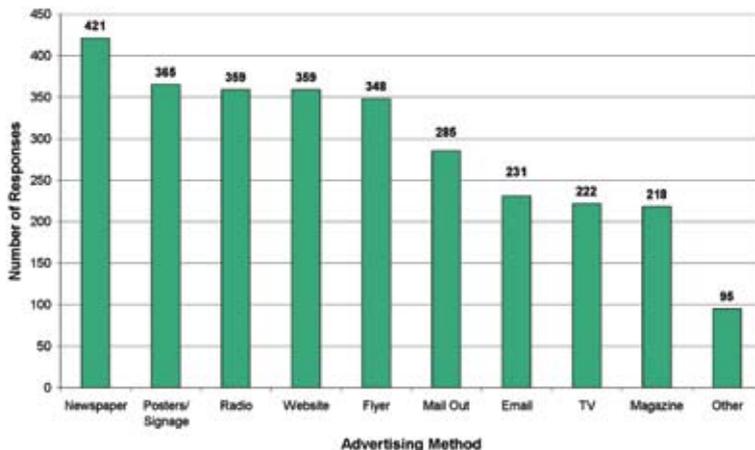
Over half (54 percent) of respondents indicated they have changed their method of advertising over time, of which a significant number (32 percent) introduced websites and email. 14 percent said that they had simply increased their level of advertising, while 28 percent said they had better targeted or adjusted their advertising. In some cases this involved ditching expensive advertising methods and seeking free editorial coverage in local newspapers, as well as focusing on the

particular qualities of their festival and hoping for steady growth based on word-of-mouth.

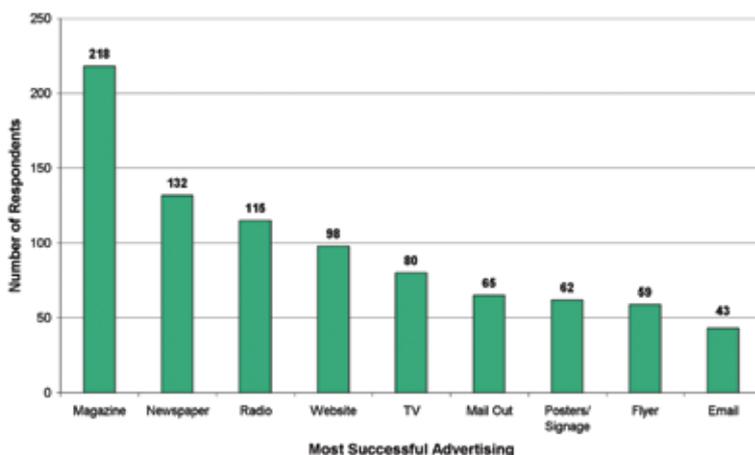
A small agricultural show in Victoria illustrates this: it made decisions to deliberately exclude itinerant stallholders, for reasons of protecting local businesses and charities (who run the cake stall and art and craft stalls) and to protect the supposedly traditional character of the festival. Entertainment was more carefully selected to avoid competing with larger shows (e.g. reducing showbags and fairground rides). Newspaper and radio advertisements were scaled back, with virtually nothing now spent on marketing. This ‘back to roots’ strategy worked, and improved quality of the event increased patronage through word-of-mouth. “*The Land* (newspaper) desperately wanted us to advertise. But we reckon it’s a dead loss. Our publicity involved an ad in one of the district papers, and we then send out these flyers with our local paper about a month before the show. That is really our biggest publicity. We get a lot of pressure from all kinds of publicity people wanting us to use their services. But we aim to spend under \$2000 on publicity every year. Some shows spend huge amounts of money of publicity. We came to the conclusion that this was a waste of time many years ago. Do we benefit from advertising in *The Land*? General consensus, none whatsoever.” Ironically, this show is now very popular in the region, particularly amongst educated, urbanite residents from bigger towns, precisely because it is seen as an authentic old-fashioned show.

We asked festival organisers about what they found were the most successful forms of advertising. The most common response was for magazines (45 percent). Although expensive, magazines often target a specific audience dedicated to a particular activity or theme, such as agricultural, hobby, sport, lifestyle, or music which will reach the target demographic most directly. Newspaper and radio fared less well, with only around a quarter of respondents indicating the success of these methods (27.5 and 20.5 percent respectively).

Increasingly, direct marketing techniques are being developed by those festivals with professional event managers or where marketing is subcontracted to tourism experts. A wine festival in the Tenterfield region of NSW was typical of this: they developed a sophisticated campaign, distributing postcards at vineyards and tourism trade shows with instructions that ‘if you’re interested, return this postcard to us with your details and we’ll send you information’.



Methods of advertising used by surveyed festivals



Which of the above do you consider to have been the most successful means of advertising?

Returned postcards are entered into a database of contacts. Glossy brochures and information booklets about the festival are then sent only to those in the database. “We have a direct contact list of people who are genuinely interested. So we’re not sort of out there everywhere, but we’re targeting people that have already shown interest. We got 10,000 printed. And whilst we certainly don’t get anything like that number back, we know that the ones we get back are definitely interested. Generally one will come back but it won’t be one person that comes, it’s maybe a group of 5 or 6 that come with that one person, so we’re reaching a bigger audience.”

BUILDING COMMUNITY



ChillOut Festival, Daylesford Photos: Chris Gibson

Building community was one of the most common aims of the festivals surveyed for this research. Not surprisingly, when festival organisers were asked to gauge the extent to which their event ‘benefits the local community’ (on a five point scale from ‘not at all’ to ‘a large extent’), 84 percent chose ‘reasonable extent’, ‘quite a lot’ or ‘to large extent’. Somewhat more illuminative were results to questions that asked festival organisers to respond to the statement ‘Some parts of the local community express opposition to our festival’. The wording of this was such that it invited respondents to be honest about their answers, without necessarily self-incriminating their festival as actually having genuine problems in terms of community acceptance. The results were that 39 percent strongly disagreed with the statement; 34 percent disagreed; 10 percent were not sure how to respond; 14 percent agreed with the statement, with only 1 percent strongly disagreeing. The overall positive story about festivals’ roles in building community is reflected here in a clear trend to deny that there are parts of local communities that oppose the festival. Yet there were 15 percent of respondents who did agree to some extent with the statement – suggesting that at least in certain cases there is

the likelihood for conflict within a community. This does bear out an emphasis in the academic literature on festivals, which has pointed out that who are ‘the community’, and who benefits from festivals, is not always clear or accepted. Divisions are likely to stem from uneven distribution of economic benefits; perceived clashes of cultures between locals and visitors attracted to a festival; and logistical problems associated with large crowds, such as parking, noise and congestion.

A different angle on the theme of building community was to ask festival organisers about their perceptions of whether the local community were more concerned with social impacts (such as culture clashes, noise and anti-social behaviour) than economic impacts. The literature suggests that host communities enter into a process of collective ‘social exchange’: they will be willing to engage with tourists arriving for festivals if monetary benefits accrue – but only to a point. If social costs are too great, no amount of monetary benefits will be enough to convince a local community that a festival is on balance ‘a good thing’. Results from our survey question show that festival organisers were divided in their perceptions of this social exchange trade-off. 35 percent of organisers disagreed or strongly disagreed with the statement, suggesting that economic benefits were of a higher priority. Another 40 percent agreed or strongly agreed – suggesting the opposite was the case. Another 26 percent again were undecided. This is a classic ‘three-way split’ in the sample, implying that complexity and divergence in experiences lay behind the results.

Another insight from the academic literature on festivals was confirmed in this study, regarding the extent to which community acceptance of events improves over time, as monetary benefits accrue, as attitudes to outsiders soften, and as residents come to appreciate how festivals ‘put their place on the map’ in terms of publicity and promotion. In response to the statement “Community attitudes have become more favourable since the inception of our event”, only 4.5 percent of organisers disagreed or strongly disagreed. 27 percent were unsure; while 64 percent agreed or strongly agreed.



ChillOut Festival, Daylesford, Victoria

ChillOut, in Daylesford, Victoria is pitched as “Australia’s largest lesbian and gay rural festival”. This festival builds alternative understandings of community by providing an opportunity for local residents to challenge their everyday assumptions about sexuality. For example, Michelle, a fifty something, farmer, mother and thirty-year resident, attended Carnival Day as an opportunity to raise funds for a wildlife society. While discussing the social impacts of festivals in an interview for this research, she explained a change in her attitudes towards lesbian and gay sexualities:

Michelle: I’ve always been aware that it’s [ChillOut] been on. Ethically I don’t approve of gay and lesbian relationships but have tolerated it as ok. That’s their lifestyle and this is my lifestyle and so I’ve always been aware of what’s been going on. I didn’t become involved with it because probably I didn’t feel entirely comfortable about it, and I didn’t see any reason for them, for me needing to be part of their scene or vice versa.

Interviewer: But that was a huge step for you to take in terms of going to the festival and given your initial discomfort?

Michelle: No I wasn’t uncomfortable about it because I just thought well if I see something I don’t like well I won’t keep looking at that. I didn’t go wandering and see anything I just wasn’t entirely comfortable to do. I was just happy to stay at the stall and see what I could see from there... I think it’s [ChillOut] good, if our society’s going to change. If there’s going to be such a big percentage of these people that they need to feel comfortable to be in the community that we have to take on board their [perspective], the way that they look at life and it has to be. It can’t be them and us. It has to be an integrating and a mellowing of things. It’s not always black and white; there are shades of grey. (Interview 13th March 2006)

Michelle’s views show an initial anxiety of accepting lesbian and gay sexualities in rural Australia. Her discomfort prevents her from moving beyond the confines

of her wildlife fundraising stall. Yet, the assumptions she held about lesbian and gay sexualities (that she would feel threatened by them) are dispelled by actually attending, and being part of the event – even if timidly. Few events are as successful as community festivals in being able to bring otherwise disparate social groups together in this way. For Michelle, attending ChillOut had the capacity to enlarge her understanding of community.

GREENING FESTIVALS



Kangaroo Valley Folk Festival Photos: Robbie Begg



During the time period in which this research was conducted, community and government attitudes to the environment – and more specifically to sustainability in a climate-conscious era – shifted markedly. An honours thesis conducted by Colleen Wong (Wong 2005) early in the project for the first time modelled the ecological footprint of a festival – in that case a major music festival – trialling methods of data gathering and analysis. Results showed that the

...the per capita ecological footprint from attending a festival is notably lower than the average per capita national ecological footprint for Australia

per capita ecological footprint from attending a festival is notably lower than the average per capita national ecological footprint for Australia, converted to an equivalent time period. It appears possible that it is more sustainable to be attending festivals than staying

at home or undertaking 'ordinary' daily activities over the same period. Reasons for this are that many of the forms of energy (e.g. sound and lighting) and inputs consumed at a festival are consumed collectively – and thus at a lower per capita level – than if the same number of people were at home or going about their ordinary business. According to Wong's calculations, where ecological footprint impacts were most negative was in methods of transport used to and from the festival. If festival organisers are able to reduce car dependency as a method

of transport to and from festivals and events, substantial reductions in the overall ecological footprint are possible.

In the festivals survey, we asked organisers about whether they had an environmental management strategy, or were required to complete an environmental impact statement as part of their approvals process with local authorities. 32 percent of festivals surveyed incorporate an environmental management strategy (EMS) for their event. For many festivals, an EMS is not a necessary requirement for the event to proceed. Implementing such strategies is an additional cost for festival organisers and often requires specialist knowledge to establish and implement strategies. Only 16 percent of festivals surveyed are required to submit a development application or environmental impact statement to stage their event. There are however a growing number of festivals – beyond those dubbed as 'environmental festivals' per se – plugging their environmental credentials. Yet more work clearly needs to be done converting these sentiments into more stringent environmental controls. Of the 80 percent who are not required to submit a DA or EIS, just 18 percent submitted one voluntarily.

PUTTING PLACES ON THE MAP

Festivals can place or keep towns on the map. With their qualities of vivacity, quirkiness and seeming spontaneity, festivals can be a great way to market places – much more effectively, it seems, than through official branding strategies (which invariably result in dull corporate logos and slogans). Marketing a place through festivals enables celebration of natural links, local produce and industry, seasonal transitions or other endogenous cultural traits and at the same time, creates an association with place that lingers in the national imagination: Grafton’s Jacaranda Festival; Casino’s Beef Week; the Collector Pumpkin Festival; Lithgow’s IronFest; Guyra’s Lamb and Potato Festival; Gundagai’s Dog on the Tuckerbox Festival. Other places became ‘festival places’ less because of any link to local uniqueness, but because of famous, iconic or ‘authentic’ festivals held there that have become legendary within particular national (and international) audiences: Port Fairy (and its folk festival); Byron Bay (and its East Coast Blues and Roots Festival); the Goulburn Blues Festival; the Wangaratta Jazz Festival, the Tamworth Country Music Festival.

In particular circumstances towns have been able to gain significant economic and social benefits by developing and trading on unlikely, improbable, even wholly fictitious events and associations. At Tamworth, an association with country music (that most iconic of American music styles) was carefully cultivated in the 1980s and has since become pervasive. At Bundanoon, a mere similarity in pronunciation with the iconic Scottish Brigadoon led to a Scottish festival which has over time become renowned as an ‘authentic’ celebration of heritage and ancestry. At Boorowa’s Irish Woolfest, the somewhat whacky, yet brilliant idea to replicate Pamplona’s ‘running of the bulls’ has led to the ‘running of the sheep’ down the town’s streets, earning the town national television coverage. Other festivals have focused on scarecrows (Kurrajong), beards (Glenn Innes), chocolate (Latrobe), mud (Bulli) and metal (the music style – at Scone). The Parkes Elvis Revival Festival demonstrates how a small place can stage a festival in a relatively remote location, and succeed in generating substantial economic benefits, in fostering a sense of community, and in gaining nationwide notoriety and/or publicity without any particular local claim to musical heritage. Indeed, the festival represents about as narrow a rationale for an event as can be imagined – the legendary performer is long dead, and festival visitors arrive to see mere impersonations of the original. Yet

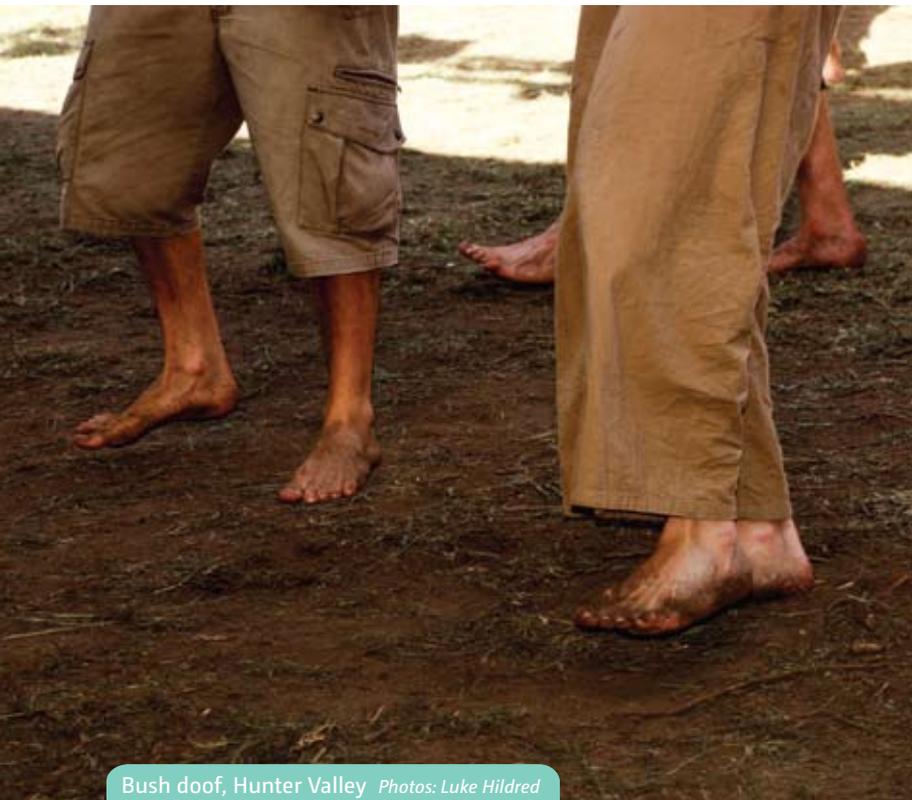


Casino Beef Week Photo: Therese Schier

the festival has invigorated the town, attracted loyal, repeat visitors and gelled a community together on an otherwise hot and dusty weekend in the tourist off-season, because it is well-organised, slightly weird, in a friendly town and above all, fun.

There are lessons to be learnt from successful examples of a festival places: success doesn’t come easily; it requires logistical effort, squads of volunteers, and ultimately, individuals who are willing to bear the burden of the long hours and stress involved in event management. Second, risks sometimes need to be taken. Weird can be good, as can carving out a niche that might seem fanciful at first – because these help in getting national publicity and reputation. Blues, jazz, food and wine festivals are comparatively ‘safe’ – and might be just what a community wants from a local festival. But they have proliferated in recent years. If organisers are more ambitious, something different is needed to put a town ‘on the map’.

TOGETHER IN HARD TIMES: FESTIVALS IN DROUGHT-AFFECTED COMMUNITIES



Bush doof, Hunter Valley Photos: Luke Hildred

At the time of this research, south-eastern Australia had experienced the longest and most severe drought in living memory. It was incumbent on us to ask questions of festival organisers about what drought meant for them and their local communities. 70 percent of organisers said that their community had been impacted by the drought in some way. Of the 336 respondents who indicated their community had been affected by drought, this was largely due to the impact upon rural and regional farming industries (32 percent) and the associated economic downturn facing the communities reliant on the agricultural sector (31 percent). 17 percent noted that their community had been impacted by water restrictions. Some communities have been placed on severe water restrictions, affecting many aspects of community life. 9.5 percent of respondents stated the impact had been both economic and social, while 3 percent stated the drought had impacted upon community morale. 7 percent noted the drought had generally had a major impact on the community.

43 percent of festival organisers said that the organisation of their event had been affected by drought. The effects upon the organisation of festivals vary in extent of the impact. Of the 206 respondents who indicated their festival had

been impacted by drought, the most common form of impact were reduced entries for the event (43.5 percent). This is often the case for agricultural shows where pastoralists, farmers and other growers are unable to attend the event due to time limitations or lack of crops or stock for display or competitions. Festival organisers also noted (26 percent) that it had been harder to gain sponsorship from local businesses that were also facing declines in income. Organisers also noted there had been an aesthetic decline which impacted upon the organisation of their event (in 50 cases, or 25 percent). This included lack of water availability to water grounds and parks. Smaller numbers of organisers specified other reasons such as drastic measures of event cancellation (15 festivals, or 7 percent) or a complete venue change (12 festivals, or 6 percent). 3 festivals (1.5 percent) said that the drought had created a positive impact of greater environmental awareness. When drought was raised as an issue for festival management, this was often said to be about issues of water use (55.5 percent). Water is a requirement for many sporting and agricultural events, where fields and tracks need to be watered for safety of competitors and stock. Many rural and regional areas have imposed water restrictions where the use of water at events is limited. Those festivals with water based activities have also expressed concern over the condition of the lakes and rivers on which they are situated. Other concerns raised include issues of financial viability and the long term viability of the running of the festival.

On the flip side, 43 percent of festival organisers believed their event played a role in helping their community adapt to the current drought. The majority of these respondents indicated reasons such as lifting community spirit, bringing the community together, allowing the community to come together for fun and forget the drought situation, and for facilitating meeting new people with similar interests or other residents of the community. The results from this question again highlight the importance and contribution of non-metropolitan festivals beyond their economic value, as community building and social networking occasions.



FUTURE CHALLENGES



Deniliquin Ute Muster *Photos courtesy of Deniliquin Ute Muster*

Can there be too many festivals?

Festivals have proliferated in recent years. This is both a sign that the sector is growing and becoming more sophisticated, and that the general public increasingly see festivals as a fun way to use their leisure time. Some festival organisers feared that there was a 'limit' to this, and that eventually festivals would start to fail as communities became 'festivalled-out'. This was particularly the case for music festivals. The growth in music festivals has not necessarily been matched by either a growth in audiences, or growth in the number of high quality local acts available to hire for performance. With increasing numbers of festivals vying to secure the same number of available bands, competition becomes fiercer and the risks of failure increase.

So too, when towns become so well-known for festivals, as in Byron Bay and Daylesford, there is the real risk that locals begin to resent the repeated crowds, parking problems and noise. If not carefully managed, too many festivals can reduce local quality of life.

One way to address this challenge is through better articulation of a festival's goals:

clearly, festivals succeed when there are clear visions of their aims and purpose; a sense of what makes them different and unique; and meaningful engagement with audiences, seeing them as communities of interest, rather than more cynically as 'bums on seats'. Product differentiation helps enormously too – there are communities of interest around the most specific themes, arcane passions, personal obsessions: within just one tiny niche of festival – car shows – there are further niches: vintage cars, custom-designed cars, hot rods, car clubs, brand-loyal car owners (Minis, MGs, Volvos...) – all of which have their own festivals and events in an increasingly organised calendar. Multiply this diversity by the array of other possible specialisms – in music, food, produce, sport, in nature – and the extent of possible diversification is endless. Our sense from conducting this research is that local demography does provide a limit to the number of festivals, and that too many festivals can eventually become a bad thing for small places with limited capacity. But overall, the range of possibilities for proliferation has not yet been exhausted.

Economic uncertainty

At the time of writing, the global financial crisis is being felt in terms of changing patterns in consumer demand and spending. It remains to be seen how this will affect the festivals sector. An immediate conclusion might be that with less disposable income around, audiences will attend festivals less frequently and thus the sector as a whole will retract. The likelihood of this is most apparent for large festivals with expensive tickets. Similarly, evidence from our festivals survey suggests that when local communities experience economic hardship – as was the case in those places affected the worst by drought – festivals do suffer in terms of reduced sponsorship from local businesses.

On the other hand, it may well be that the festivals sector is able to survive and even thrive in the new economic climate. Many of the tiny community festivals we surveyed had very low outlays, virtually no sponsorship, and relied very little on custom infrastructure and services. So long as key individuals still have the time to commit to organising a festival, their levels of risk are very low. Also, with less cash in the household, families may well turn towards free or low cost community events as opportunities to get out and have some fun relatively cheaply. Certainly historical experience from the Great Depression suggests that this is a likely pattern of response to hardship. Festival-goers with limited budgets may become more choosy about which of the mega-events with high ticket prices they will attend in a given year or season; but at the same time, grass-roots community and particularly unticketed/free events may well become *more* regularly frequented than before. Our historical data also shows that when festivals have been cancelled it has tended not to be because of an overall climate of economic hardship – but because of world wars, or more recently, because of drought-related water restrictions. It seems there is an in-built resilience to economic fluctuations within the festivals sector.

One pro-active move that authorities could consider making to better ensure the viability of the festivals sector in this period of hardship is to address the on-going issue of exposure to increasing public liability insurance costs. In our survey, 55 percent of festival organisers agreed or strongly agreed that rising public liability insurance costs have impacted on their ability to run the festival. This trend was higher again for agricultural shows in particular. If individual festivals are running close to break-even point and economic hardship impacts their viability



in terms of reduced sponsorship from local businesses, rising public liability insurance might be precisely the kind of external factor that pushes them into insolvency. Local councils who see festivals as a valuable component to local economy and culture would do well to work with local festival organisers on ways to reduce exposure to this risk.

Generational change

Many of the festivals we talked to were concerned about the future of their events because of generational change. On the one hand, festival organisers were concerned that not enough young people were coming through and volunteering to help out in organising festivals. On the other, there was concern that the rapid pace of modern life, longer-working hours and competing demands on time were limiting the capacities of people of all ages to volunteer and contribute. Don Murchie from Walcha Show said to us in an interview that “it is difficult to keep young people involved. I can see that there are young people starting to take an interest again and I think that maybe its one of those cyclic things. They are now beginning to realise that there is a value in belonging to an organisation or community, part of society. I know a young fellow who is in his thirties, and he’s not interested in the show whatsoever, and his comment was “what’s in it’s for me?”. Sadly that reflects that generation. I don’t think society is going to fall in a heap because young people aren’t interested. We do have a problem with younger people taking leadership roles though, I don’t know how to over come that.” The best festivals build communities out of audiences. The ongoing challenge seems to be translating success into a stronger sense of civic contribution behind the scenes.

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