

Research report

Professorship
Transformational
Media

NHL
STENDEN

Harmonizing Sustainability

ESNSExchange

Evaluating Practices and Communication
in European Music Festivals

Professorship Transformational Media

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1. Introduction

Eurosonic Noorderslag (ESNS) is a non-profit music conference and showcase festival exclusive to European artists. Its core mission is to promote and enhance the circulation of European music not only within the continent but also globally. Over the years, ESNS has built a strong reputation for launching emerging acts into the international live music scene. Renowned artists like Altin Gün, Arlo Parks, Alyona Alyona, Celeste, Daði Freyr, Dua Lipa, Fontaines D.C., Friedberg, Go_A, K.ZIA, girl in red, Hinds, Meduza, Meskerem Mees, MYD, Priya Ragu, Pip Blom, Pongo, Sigrid, and Wet Leg owe their breakthroughs to the showcase event.

Beyond being a conference and festival, ESNS serves as a prominent platform and collaborator for European partnerships within the industry. One of its initiatives, the ESNS Exchange, facilitates the booking of European acts at festivals outside their home countries, resulting in extensive media exposure for these artists. The European Broadcasting Union (EBU), export offices, and local media work together with ESNS to achieve this goal. Through the ESNS Exchange programme, the organization strives to propel the international careers of European musicians.

ESNS actively engages with around 130 festivals across Europe and beyond as part of the ESNS Exchange program. As a leading partner in this initiative, ESNS aims to transition into a fully sustainable festival in the coming years. It recognizes its role in spearheading the sustainability aspect of the ESNS Exchange and the industry at large. However, the current lack of information regarding the industry's sustainability practices poses a challenge, leaving ESNS uncertain about the necessary steps to improve the market as a whole.

The NHL Stenden Professorship Transformational Media, ESNS Exchange and the minor Music Management are collaborating on a joint project to address this issue. The project aims to assess the current state of sustainable practices in European Music Festivals and analyse how these festivals communicate their initiatives. Additionally, students in the Music minor program will create and test a prototype to encourage festivals to communicate about their sustainability activities.

2. Research Sustainability & Music Festivals

2.1 Sustainability at festivals

The significant environmental and social impacts associated with music festivals have raised concerns about their long-term sustainability. Recognizing the importance of addressing these challenges, the concept of sustainable music festivals has become a crucial focus for event organizers, industry professionals, and researchers. Sustainability in music festivals involves implementing practices that minimize negative environmental impacts, promote social responsibility, and foster community engagement. By adopting sustainable measures, festivals can contribute to the global effort to combat climate change, reduce waste generation, and enhance the overall well-being of local communities. Music festivals have significant environmental footprints, primarily driven by energy consumption, waste generation, and transportation emissions (Razaq & Musgrave 2009). Sustainable music festivals also have the potential to inspire and educate attendees about environmental issues and sustainable lifestyles. Festivals can have transformative power in promoting sustainable actions among participants, such as reducing single-use plastics, adopting eco-friendly transportation options, and supporting local and sustainable food vendors (Nightingale 2022). Moreover, sustainable music festivals can positively impact local communities through fostering positive relationships with host communities, contribute to their economic development, and promote social cohesion (Gursoy & Kendall 2006).

2.2 Importance of Music Festivals Communicating Sustainability Efforts

In the pursuit of sustainability, it is crucial for music festivals to effectively communicate their sustainability efforts to their audiences. Transparent and proactive communication plays a significant role in raising awareness, engaging attendees, and inspiring collective action towards a more sustainable future. Transparent communication strengthens the perceived authenticity of a festival's sustainability efforts, leading to increased trust and positive attitudes towards the event (Dodds, Novotny & Harper 2020). By sharing their sustainability initiatives, festivals can establish themselves as responsible and trustworthy entities within the industry. Festivals are influential in shaping attendees' environmental attitudes and behaviours (Laing 2018). By communicating the rationale behind sustainable practices and providing information on how attendees can contribute, festivals can empower individuals to make sustainable choices in their daily lives. When music festivals communicate their sustainability efforts, they create a sense of shared responsibility among attendees. Festivals that engage their audiences through clear communication channels foster a feeling of co-ownership in sustainability initiatives. This sense of ownership could encourage attendees to actively participate in sustainability programs and initiatives, creating a collective impact. In addition, open communication channels enable festivals to receive valuable feedback from their audience regarding sustainability initiatives which allows them to refine and improve their sustainability practices over time. Moreover, by effectively communicating their

sustainability efforts, music festivals can enhance their reputation as socially and environmentally responsible events. Festivals with a strong sustainability reputation have a competitive advantage in attracting environmentally conscious attendees (Werner, Griese & Faatz 2020).

2.3 Research question

Considering the importance of sustainability and communication in music festivals, the research question emerges:

To what extent are ESNS Exchange festivals committed to sustainability, and how do they communicate about this?

3. Method

Two research approaches were taken to explore the extent to which ESNS Exchange festivals are committed to sustainability, and how they communicate about their sustainability practices: a content analysis and an online survey research. These analyses will provide valuable insights into the sustainability topics addressed by festivals in their operations, as well as reveal any patterns in their communication strategies on their websites, if applicable.

3.1 Content analysis

A content analysis was conducted to evaluate the level of commitment demonstrated by festivals towards sustainability, and to examine the manner in which this commitment is communicated through their websites. Content analysis is well suited to qualitative research questions whose answers can be found in readily available sources of information. Based on the six key themes of sustainability among festivals as discussed by Future Festival Tools (See Fig. 1) as well as the set of categories (objective categories such as size, country, and length of the festivals), the coding scheme was developed.

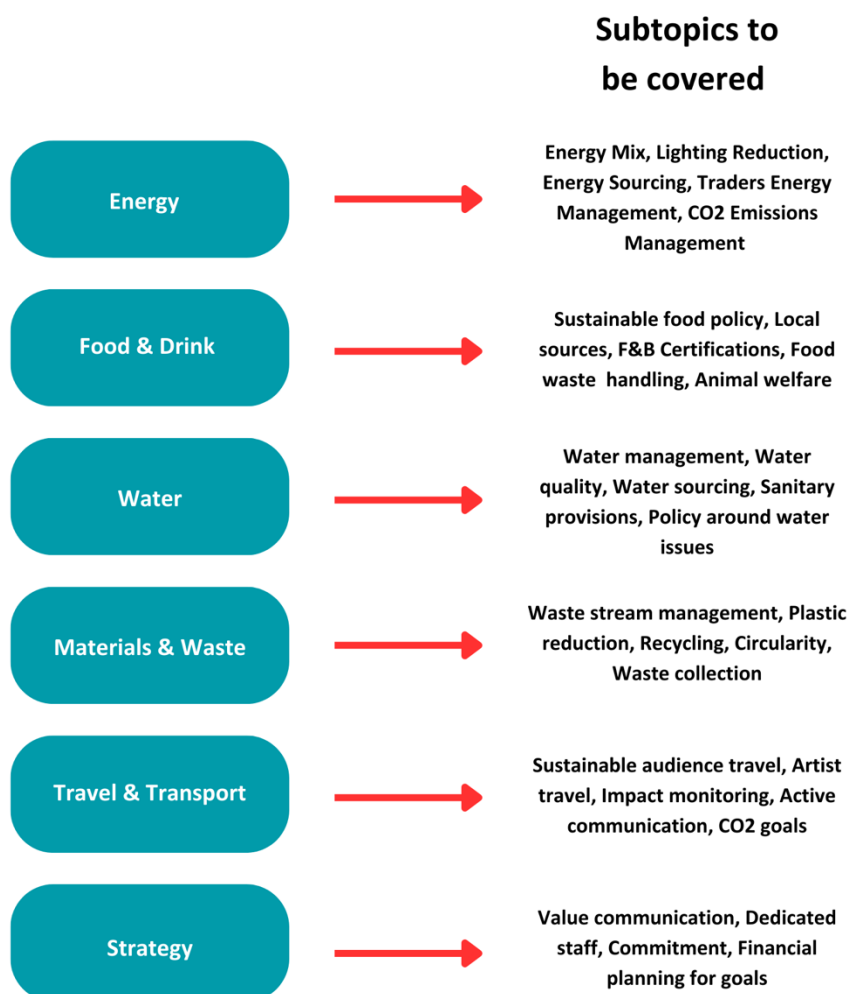


Figure 1 Coding Scheme Content Analysis

The coding criteria were quantified and ranked, and a binary coding system of "Yes" or "No" was employed to denote the presence or absence of each criterion. Upon completion of the coding process, the collected data was analysed to uncover patterns and draw meaningful conclusions that address the research question. The analysis was conducted on a sample of 39 of the 130 festivals. We conducted an analysis using the Google Translate feature in Chrome because festivals typically provide more information in their "native" language than in English.

3.2 Survey Research

Subsequently, an online survey was conducted to investigate the extent of commitment displayed by ESNS Exchange festivals towards sustainability and to explore their communication practices in this regard. The research employed an online questionnaire developed in collaboration with ESNS and distributed among representatives of the ESNS Exchange festivals from May 15th to June 19th, 2023. The questionnaire was created using Qualtrics software and was administered in English. A total of 53 respondents participated in the survey. After the data cleaning process, the final sample size consisted of 43 respondents.

The participants were initially presented with an introduction that outlined the purpose of the study, emphasized its voluntary nature, and assured them of the anonymity of the collected data. They were given the choice to accept these terms and proceed with the questionnaire or to exit the survey. The questionnaire then proceeded with inquiries regarding the participants' roles at the festival, the type, location, and size of the festival they were associated with.

Following this, questions were posed concerning the sustainability issues that the festival addresses and the perceived importance of these issues. For the survey the six key themes of sustainability among festivals from Future Festival Tools were also used. Participants were subsequently asked to what extent specific obstacles hindered the festival's progress towards achieving greater sustainability. This was followed by an inquiry about which sustainability topics the festival communicates to its target audience, the frequency of such communication, and the media channels utilized for this purpose.

Additionally, participants were asked to what degree a defined set of obstacles impeded the festival's communication efforts regarding sustainability. They were also queried about their involvement in existing green initiatives and tools. The questionnaire ended with an end briefing and contact details for questions and/or comments based on the survey. The questionnaire can be shared upon request. SPSS was used to analyze the data.

4. Results

4.1 Results Content analysis

We conducted a thorough content analysis of 39 websites participating in the ESNS Exchange programme. These websites consisted of 21 large festivals (with over 20,000 visitors), 17 medium festivals (with 5,000 to 20,000 visitors), and 1 small festival (with less than 5,000 visitors). Strikingly 25 festivals did not mention any information with regard to sustainability on their website (See Fig. 2).

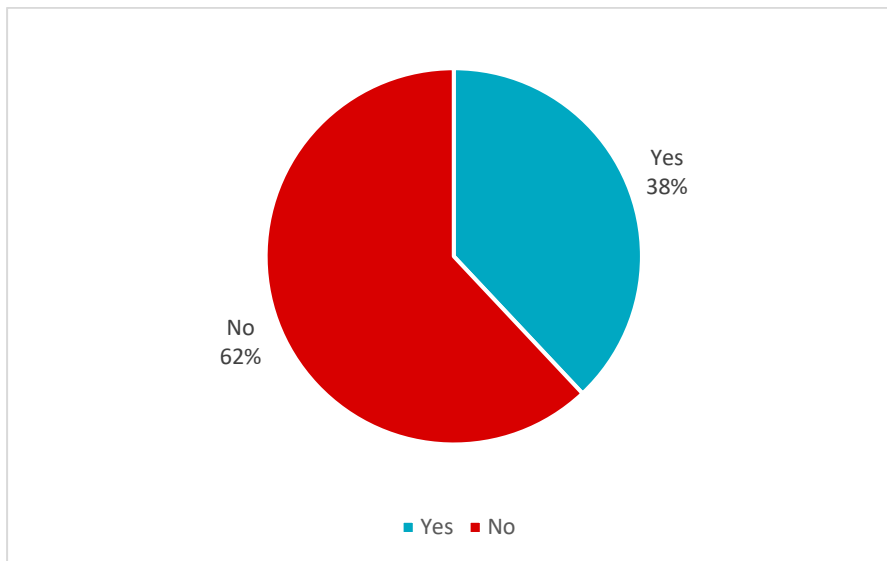


Figure 2 Percentage of festivals mentioning sustainability on their website (n=39)

Out of the 21 large festivals, 11 mentioned sustainability related topics on their websites. On the other hand, only 3 out of the 17 medium-sized festivals mentioned sustainability related topics. The small festival did not have a sustainability policy incorporated on its website. The percentages are displayed in Fig. 3.

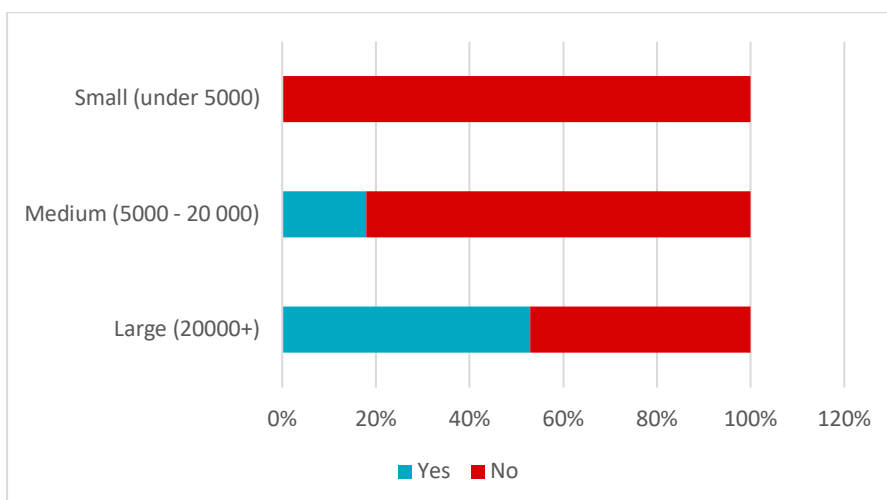


Figure 3 Differences in mentions x size festival (n=39)

Figure 4 shows the mentions per sustainability theme.

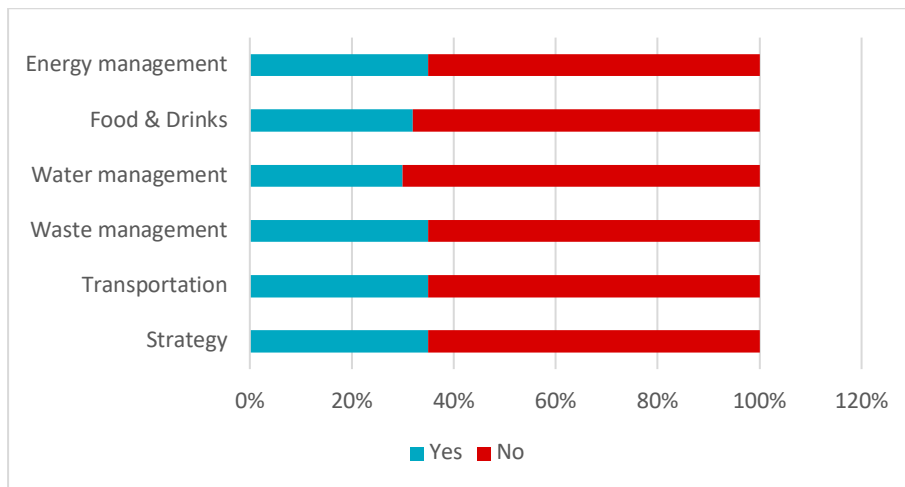


Figure 4 Mentions per sustainability theme (n=39)

4.2 Results Survey Research

Descriptive information respondents

Usable data was retrieved from 43 festivals. The majority of respondents represented festivals in Germany (9), Italy (6), Spain (4), Switzerland (3) and Austria (2), France (2), Serbia (2). Other countries that were represented with 1 festival per country were Belgium, Croatia, Czech Republic, Denmark, Estonia, Finland, Hong Kong, Hungary, Latvia, Lithuania, Macedonia, The Netherlands, Norway, Slovakia, Slovenia. The position of the respondents was quite diverse. The majority of the respondents are booking agent (13), Event production – Other (10), Event production – sustainability (6), Artist Liaison (3), Event production – logistics (3). Two respondents were responsible for Marketing and PR and Education – talent development. One respondent from Artist and Representation – artist management, Event production – event technology, Finance – accountant, Finance – sales and sponsorships, Finance – Other. 11 respondents indicated the “other” option.

As becomes clear from Figure 5, the respondents primarily represent multiple-day outdoor festivals, followed by multiple-day indoor festivals. Additionally, there is one representation of a one-day indoor festival.

Regarding the number of visitors, Figure 6 indicates that the majority of the festivals represented had attendance below 5000 individuals. The second-largest group consists of festivals with over 20,000 visitors, while the medium-sized festivals with a visitor count ranging from 5000 to 20,000 come next in line.

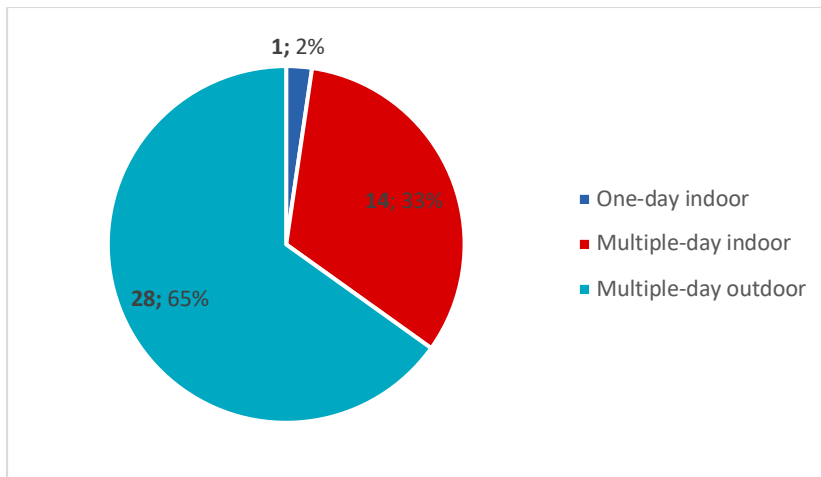


Figure 5 Type of festival

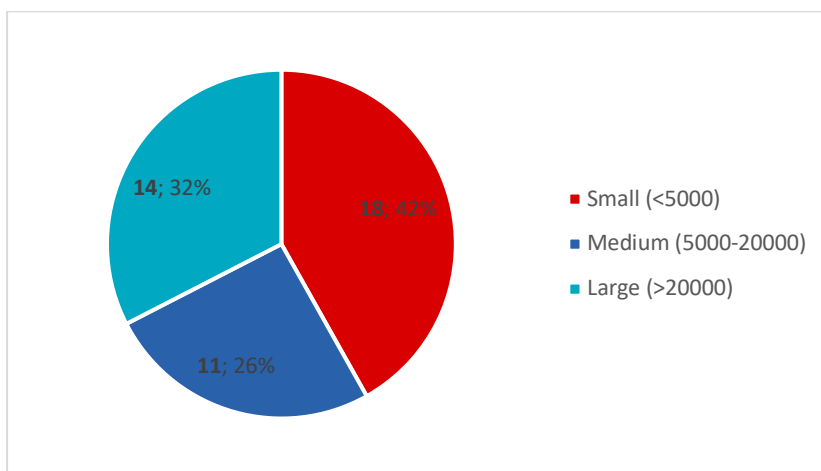


Figure 6 Size of festival

Sustainability at participating festivals

Table 1 reveals that the majority of festivals prioritize sustainability efforts in the categories of material and waste management, as well as food and beverages. However, three festivals reported not addressing any sustainability issues. Notably, one festival stands out by implementing a comprehensive range of activities that concentrate on sustainability issues beyond those listed, with a particular emphasis on social inclusion.

Table 1 Which sustainability issues does the festival address?

Sustainability issue	Number of cases	Percentage
Material and Waste	34	79%
Food and Beverages	33	76%
Travel and Transport	23	53%
Energy management	22	51%
Strategy	21	49%
Biodiversity and Society	18	42%
Water management	16	37%
None	3	7%

Another sustainable issue that was mentioned was, soil preservation policy.

Table 2 illustrates the significance of sustainability issues to the festivals, rated on a scale from 1 (not important) to 7 (very important). While material and waste, as well as food and beverages, receive the highest scores, it is worth noting that the mean value for each category is relatively high. This suggests that the presented sustainability topics hold a certain level of importance for the festivals.

Table 2 Importance of the sustainable issues to the festivals

Sustainability issues	Mean	Std. Deviation
Material and Waste	6.27	0.980
Food and Beverages	6.10	1.062
Travel and Transport	5.83	1.341
Energy management	5.67	1.348
Strategy	5.43	1.695
Water management	5.40	1.354
Biodiversity and Society	5.40	1.545

The survey participants were asked to rate the obstacles that hinder music festivals from achieving greater sustainability on a scale from 1 (not at all) to 7 (very much). The results of this rating are presented in Table 3. The primary challenges faced by music festivals include insufficient support from local authorities, scarcity of suppliers and lack of financial resources.

Table 3 Obstacles that prevent festivals from achieving greater sustainability

Obstacles	Mean	Std. Deviation
Not enough support from local authorities	5.03	1.779
Not enough suppliers	4.55	1.609
Cannot afford	3.97	1.643
Not enough time	3.71	1.419
No control over main stakeholders	3.29	1.697
Do not know how to encourage visitors	3.00	1.366
Lack of knowledge	2.84	1.485
Visitors are not interested	2.81	1.354
Sustainability is not important	2.10	1.700
Organizers do not think it will be beneficial	1.61	1.493

Several challenges were highlighted, including the scarcity of electricity in rural regions, necessitating the use of diesel generators. Another issue raised was the artists' limited engagement, especially considering the increasingly complex technical requirements. Additionally, the market for vendors and services was found to be small, offering limited choices and overly costly solutions that might not adhere to security, health, and safety regulations, or comply with EU standards. Furthermore, the lack of incentives for vendors to make substantial investments in such solutions was attributed to the limited number of potential clients at festivals and larger events.

Communication about sustainability

The survey participants were also asked about the sustainability issues that the festivals they work for communicate. The results are presented in Table 4. It was found that festivals primarily communicate their sustainability efforts in the areas of food and beverages, as well as material and waste management.

Table 4 Which sustainability issues does the festival communicate about?

Sustainability issue	Number of cases	Percentage
Food and Beverages	28	65%
Material and Waste	27	63%
Travel and Transport	23	53%
Biodiversity and Society	19	44%
Water management	15	35%
Energy management	13	30%
Other management	1	23%
Other	0	0%
None	0	0%

On a scale from never (1) to always (5), respondents were also asked how often the festival communicated about sustainability topics to its target audience for instance via onsite of the festival, in an app, on social media, website, in advertising.

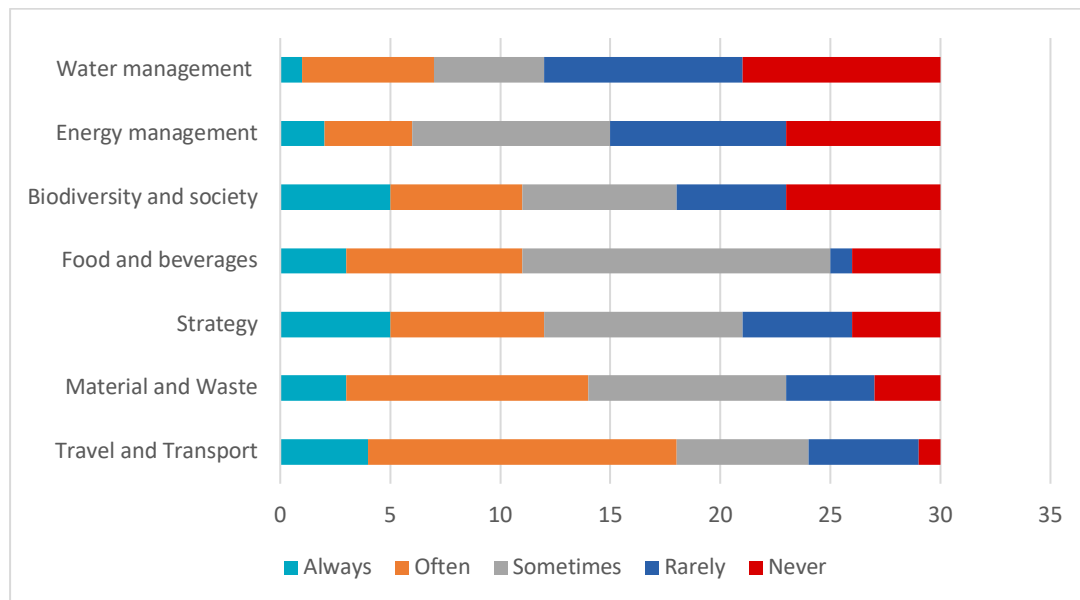


Figure 7 How often the festival communicated about sustainability topics to its target audience for instance via onsite of the festival, in an app, on social media, website, in advertising?

One respondent mentioned that the information is available on our website but is only rarely the subject of specific and active communication.

Not surprisingly, the website and social media are most frequently used by festivals for communication about sustainability (see table 5). Advertising is only applied by few festivals.

Table 5 Which media channels does the festival use to communicate?

Media channel	Number of cases	Percentage
Website	26	60%
Social media	26	60%
Messages at the site of the festival	19	44%
Events at the site of the festival	17	40%
Media coverage	14	33%
Festival's app	12	28%
CSR reports	6	14%
Independent blogs, forums	5	12%
Advertising	4	9%
Other	1	2%

The survey participants were asked to rate the obstacles that hinder music festivals from communicating about sustainability more on a scale from 1 (not at all) to 5 (very much). The results of this rating are presented in Table 6. It becomes clear that festivals do not encounter clear obstacles from the presented options.

Table 6 Which obstacles prevent the festival from communicating about sustainability more?

Obstacles	Mean	Std. Deviation
Afraid of being accused of greenwashing	2.47	1.502
Visitors are not interested	2.33	1.184
Lack of knowledge	2.07	1.048
Cannot afford	2.00	1.017
Festival is not involved in sustainability	1.57	0.898
Organizers do not think it will be beneficial	1.40	0.724

The main obstacle mentioned by the respondents was the already substantial amount of content that festivals need to communicate. This implies that festivals face challenges in effectively conveying sustainability efforts alongside other festival-related information to their audience.

In recent years, a significant amount of support and resources have become available to assist festivals in their sustainability strategies and communication. The survey participants were asked whether they utilized these green initiatives and tools. However, as indicated in Figure 8 the awareness of these tools among the festivals is limited, and only a few festivals reported using them.

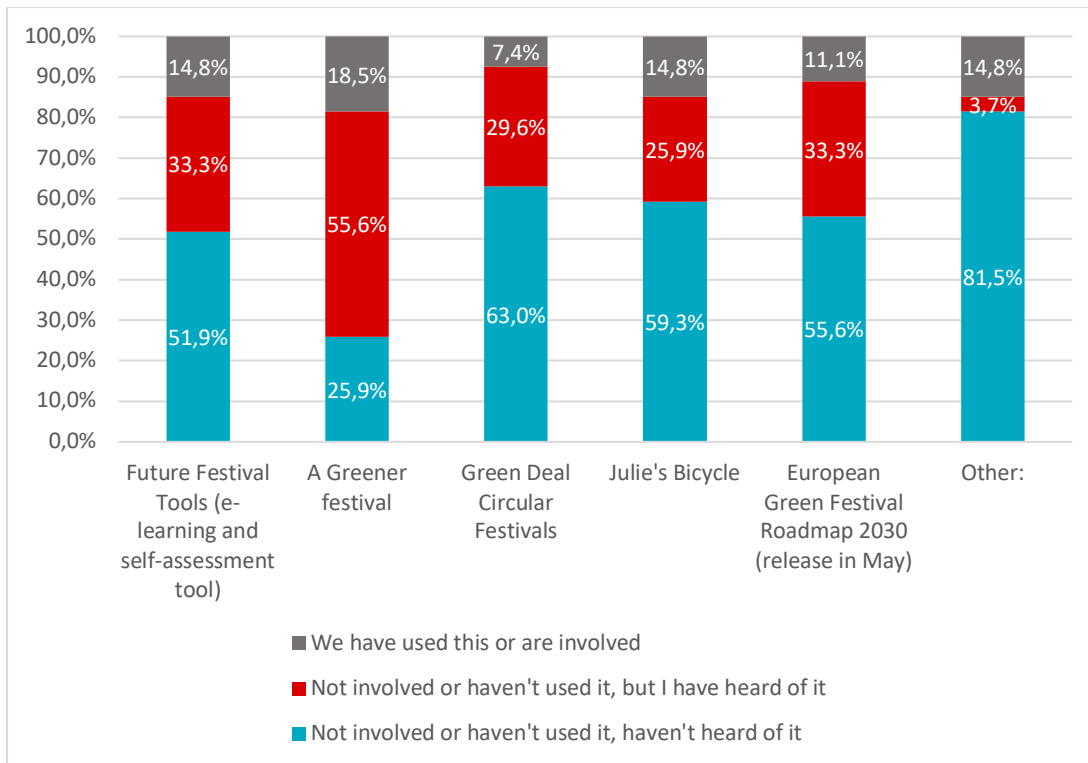


Figure 8 Please specify your involvement in the following green initiatives and tools

5. Conclusion

The objective of this study was to investigate the extent of sustainability commitment among ESNS Exchange festivals and explore their communication strategies regarding sustainability efforts. A content analysis approach was employed to examine the sustainability communication of ESNS Exchange Festivals. Additionally, a survey was conducted to gain insights into the sustainability topics addressed by the festivals and how they communicate about these topics.

The content analysis results revealed that larger festivals tend to prioritize sustainability communication more than medium-sized and small festivals. Although the sample only included one small festival, it appears that the festival's size impacts the extent of sustainability communication. The most commonly addressed topics were energy and water management, transportation, and strategy.

The survey results demonstrated that the majority of festivals address sustainability themes, with a particular emphasis on material and waste management, as well as food and beverages. These sustainability topics were regarded as important by the festivals. The primary challenges faced by music festivals include inadequate support from local authorities, limited supplier options, and a lack of financial resources.

In general, music festivals communicate about their sustainability efforts. Communication in the areas of food and beverages, material and waste management as well as travel and transport, receives the most attention. Most festivals use their websites and social media to communicate about their sustainability efforts or they communicate at the festival itself. Advertising about sustainability topics is not common. Information about travel and transport, material and waste and strategy are mostly communicated via app, social media, website etc. Festivals do not clearly indicate to encounter obstacles that hinder communicating about sustainability. Respondents mentioned that the already substantial amount of content that festivals need to communicate prevents them from conveying sustainability efforts to their audience.

Although, many tools are available to support festivals in their sustainability strategies and communication, the awareness of these tools is limited, and not often used. This shows that communication efforts to promote these tools could lead to beneficial results for festivals to become more sustainable.

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