



**Comparing festival management**  
An exploratory study of established festivals in Norway

A master thesis  
by  
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## Foreword

It has been a rollercoaster of a journey but it has been concluded with a finished master thesis. I discovered early on in my bachelor's that I wanted to focus my thesis on event management, something I am very passionate about learning more about and working with after graduation. Festival management drew me in, and an idea of comparing festivals in order to see if any management actions were similar in established and popular festivals in Norway. And here we are.

Firstly I would like to thank my advisor Dag Osmundsen in all his knowledge and support, and helping me whenever I needed to collect my thoughts.

Secondly, my thanks go out to all my teachers and the staff at NHS for their teaching and guidance over the past two years, and especially to our coordinator Torvald Øgaard.

Thirdly, a great deal of gratitude goes out to the 11 festival managers/coordinators I have been so lucky to interview. You opened my eyes in many ways and I truly appreciate all the time you put in to helping me in obtaining the information I needed. My parents also deserve a thank you, for always supporting me through all my schooling, and for continually believing in me, even at the times when I did not.

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Ingrid Melle Åkernes

## **Abstract**

This exploratory thesis seeks to explore whether established festivals have any common denominators in their management that would lead the festival to be a successful and stable festival year after year. Project management theory provides the background for 11 hypotheses assumed more relevant to festival and events management than other project management industries. Semi-structured interviews were conducted with festival leaders and supported previous research on project management. The most important focus for all involved and all over agreed upon areas were planning, and evaluation of the good and bad after the festival had been wrapped up. Risk management within safety was another big area that all agreed upon, either based on professional companies, or a combination of experience and knowledge of the festival. Another topic that proved essential was having experienced members of the management team and volunteers, and being able to learn from experiences from year to year. These results corroborate with research done previously on success factors in projects, but also tend to be very dependent on the type of festival, size of festival and the type of management team in charge of creating the festivals.

Key words: events management, project management, festivals, success.

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## Introduction

Festivals can sometimes seem as though they appear out of the blue and seemingly also as easily go under and disappear. But what makes some festivals succeed year after year and others fail? Is it luck, or is it the how the management of the festival conducts their business? Festival management research is often focused around festival visitor's satisfaction and attendee motivations (Li & Petrick, 2006; Thrane, 2002; Yuan, Cai, Morrison, & Linton, 2005), economic and social impacts stemming from festivals (Small, Edwards, & Sheridan, 2005), and the tourism that festivals attract to a destination (O'Sullivan & Jackson, 2002; Quinn, 2006; Visser, 2005). Festivals also tend to be researched in the case study research method where the focus is on one festival at one point in time (Larson, 2002; Mykletun, 2009). But little research has been done on success factors of festivals specifically, but also very little research has been done on the management aspect of festivals in particular. Especially in comparing festivals the focus tends to largely be around other aspects of management than what festival management actually does as project managers. Mykletun (2009) studied success and fail factors in a case study using six different capitals (natural, human, social, physical, financial and capital) in order to analyse the festival, and found a seventh capital, administrative, and also that there are several different reasons why the festival is successful, including a niche market with much public interest. But a focus on only management of festivals in research is scarce, and comparing management and leadership of festivals is not as easy to find, and it is also an interesting part of event management. Festivals can be quite different from other project management structures, as it can be closer to an all year continual project rather than a temporary time structure like projects have. Festivals can in some ways be compared to operations management as they are producing the



same product or a repetitive service year after year (PMI, 2013). This can be a bit different than the stages of “traditional” projects with a project life cycle with a start and an end, like most projects-oriented businesses have (Kerzner, 2013). However for the purpose of this study, the focus will be on the project management side of festivals, in a year-to-year perspective.

A project is defined by PMBOK (PMI, 2013, p. 3) as “a temporary endeavor undertaken to create a unique product, service, or result”. Which means there is a start and an end, and the results produced are special and new, not like any other similar products or services. Festivals are interesting especially because of the seemingly small margins between success and failure. For this reason, festival management has been chosen for this master thesis in order to research whether there are any common factors in the management of festivals that would help festivals stay in business year after year, and at the same time make it financially stable and attendees happy. By using project management theory, the hope is to find common factors among festivals that can help festival management to stay in business year after year. 11 hypotheses will be discussed to attempt to find these answers. In order to study more stable festivals, established festivals in Norway that have been arranged for 10 years or more have been chosen as they more likely will have well established routines and schedules rather than what younger festivals would have. The lack of previous research means the method chosen for this topic is exploratory asking the question; “Are there any common denominators in festival management that creates long running and successful festivals?” This question is to be answered using project management theory and conducting semi-structured interviews with festival managers of established festivals in Norway.

## Literature review

Project management is an area of study that is widely researched. This research is heavily focused on project-based industries such as construction or engineering, and is more infrequently to be found in traditional management industries such as business and in this case festival management (Garel, 2013). The theory on project management has been around for centuries, but it was not until the late 1950s a model came about as well as practices and standardised tools (Garel, 2013). Festivals can be viewed as a project because of their start and finish and the desire to create an outcome from a set of activities that will lead to an end result (Babu & Suresh, 1996), but also because they use human and nonhuman resources (Kerzner, 2013). However festivals can be considered their own group of projects because of their fixed dates for execution compared to for example a construction project where the deadline can be changed or moved in order to finish (Kim, Kang, & Hwang, 2012). Festivals can also be different where the management team only plans the one festival, which can run for several years if not decades. This is why this thesis will take on some project management principles that relate the most to the nature of festival management, rather than all principles relevant to project management. An example of an unrelated aspect of project management is portfolio management as this rather covers businesses with several projects within a firm that is competing for the same resources (Archer & Ghasemzadeh, 1999). However established festivals can be discussed whether they are actually project based or all-year businesses, because of their continuation year after year, but this will be continued later in the discussion. However the focus in this thesis will be on the possible denominators that can lead to project success for festivals in a long-term perspective.

## Success factors in project management

In the literature there is an array of different factors that can be used to judge whether a project is successful or not. These key success factors have a wide range and stem from different types of projects. Examples mentioned in the literature are factors like communication throughout the project (Clarke, 1999), learning from experience and using knowledge to continue to learn (Cooke-Davies, 2002), skills and characteristics of project manager and team (Belassi & Tukel, 1996), consider and analyse risks and be prepared for them (Raz, Shenhar, & Dvir, 2002), clear goals and objectives, support from senior management and adequate resources (White & Fortune, 2002), and also commitment to planning and control (Kerzner, 1987). These are all examples of what researchers have found to be key success factors in projects. De Wit (1988) reasoned that there are several factors that need to be emphasised; planning efforts (construction and design), goal commitment of the project manager, project team motivation, the technical abilities of the project manager, scope and work definition and lastly control systems.

The PMBOK Guide has defined successful projects as reaching the objectives of the project (PMI, 2013). This can be within allocated time, within budgeted cost, at the proper performance or specification level, with minimum or agreed scope changes, while utilising the assigned resources effectively and efficiently, and accepted by the customer (Kerzner, 2013). Though success factor research has been done extensively on project management, there is no guarantee these success factors are fully relevant to festival management. Dvir, Lipovetsky, Shenhar, and Tishler (1998) found results showing to the type of project could determine success factors rather than having universal factors for all types of projects. Similar results were found by Scott-Young and

Samson (2008) in the sense that not all success factors can be generalised. As mentioned above, festival management and events management is slightly different than a project related industry like IT or construction. One of these differences can be that deadlines can be moved to fully finish the project in those industries. In festivals if the work is not finished on time it is simply not finished, which makes festivals especially dependent on planning and time management. Planning is a very important stage of any project, and good planning increases the chances a project has of producing a satisfactory performance and for projects to actually be finished (Zwikael & Globerson, 2006). Pinto and Slevin (1989) found ten critical success factors that can be used by project managers when planning, and also when and where to put certain resources during the life cycle of a project. Figure 1 shows these factors arranged by at what stage in a project they would be relevant and also in order of importance.

- Stage 1: Conceptual**
  - Project Mission
  - Client Consultation
  - Personnel
  - Urgency
- Stage 2: Planning**
  - Project Mission
  - Environmental Effects
  - Schedule
  - Monitoring and Feedback
  - Client Acceptance
- Stage 3: Execution**
  - Project Mission
  - Technical Tasks
  - Top Management Support
- Stage 4: Termination**
  - Project Mission
  - Schedule
  - Client Acceptance
  - Technical Tasks
  - Personnel

Figure 1: Pinto & Slevin's 10 critical success factors (1989).

However, success of a project can be quite contextual and complex. De Wit (1988) specifies the fact that it can be up to each stakeholder group whether they perceive a project to be a success or a failure, and it can also be seen as a success one day and a failure the next. This is important to have in mind when discussing success factors in projects, and especially with festivals as it can be of a very different perception of success depending if you ask the management or attendees to a festival.

The focus areas of this research will be presented henceforth based greatly on the success factors mentioned above, and the understanding of the project principles in the PMBOK Guide.

## **Project Management**

The Project Management Body of Knowledge has identified five process groups that are typical to almost all projects in different industries, which will work together to obtain a successful end-result. These process groups are initiating, planning, executing, monitoring and controlling and closing (PMI, 2013). As project management theory is at the base of this thesis, these five groups will provide the areas of principles that will be used to create hypotheses in this research project. As mentioned, planning is a crucial stage of a project and it is believed it will be the same for a festival as well.

A central idea of the PMBOK Guide is that the processes mentioned above create a closed loop consisting of the core processes of planning, execution and controlling, where the planning process is the basis of a plan, which is accomplished through the execution process and any discrepancies from the plans or a need to change will happen in the execution phase or developed into additional changes (Koskela & Howell, 2002). These processes are more clearly shown in Figure 2.

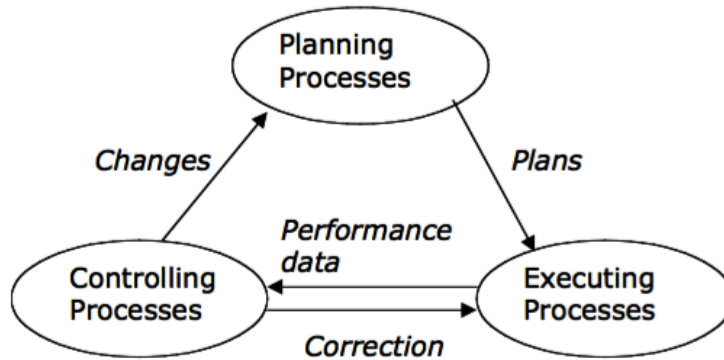


Figure 2. Core processes in a closed loop formation.

Execution is not clearly defined in the PMBOK guide although is talked about in the term of work authorisation system, and has underlying theory based on job dispatching, which covers two elements; decision making, and being able to communicate the assignment or task at hand (Koskela & Howell, 2002). As management is the overall principle in project management the following hypothesis is proposed:

H1: Successful festivals have an identifiable management cycle with planning, execution and control.

### Change control

Control on the other hand is a topic that is more discussed and researched within the project management subject. Kerzner (2013, p.193) describes controlling as “a three-step process of measuring progress toward an objective, evaluating what remains to be done, and taking the necessary corrective action to achieve or exceed the objectives”. Whereas measuring is checking how the progress of the project is towards the objectives, evaluating covers cause and ways to act if deviations from the plan occurs, and lastly correcting works to correct unwanted tendencies in order to get back on track (Kerzner, 2013). From this we can see that controlling is an important part of

project management, and the actions necessary to take if something happens that adjusts action back towards the goal of the project. To be on time and within budget is often what the control measures such as earned value focus on, although there can also be other variables that get controlled (Rozenes, Vitner, & Spraggett, 2004).

Thus we suggest the following hypothesis:

H2: Good festivals have a mechanism for change based on deviation controls

### **Customer base management and financial possibilities**

Stakeholder management is a major part of project management in the way that stakeholders have the power to impact a project, either in a positive or in a negative manner (PMI, 2013). In the understanding of festivals, the stakeholder group that has the most impact on a festival are the customers. At one point in time markets changed into becoming customer bases where individuals had something to say and became sources of business, rather than just people who would buy a product or a service (Normann, 2001). Customer base management will in this thesis be used interchangeably with customer relationship management. As in any industry that deals with selling a product or a service - customers are important. Wang and Feng (2012) found a direct link between how a company does their customer relationship management abilities and the company's business performance. By formulating customer relationship management (CRM) strategies it can add to the value creation for customers, enhance customer satisfaction and have an important role in the pursuit of business excellence (Lin & Su, 2003). CRM and knowledge of their customers is also vital for companies in growing their market share (Lin & Su, 2003). The value creation process from CRM has three key elements; determining the value from the customers, determining the value the company can give the customers, and successfully manage the

value exchange (Payne & Frow, 2005). CRM is not only about communicating with the customers, but also being able to create value for both the company and the customers in order to create a give and take relationship with its stakeholders. Acceptance and satisfaction in customers can lead to loyal visitors and a wish to revisit the festival in the future (Crompton & McKay, 1997; Schofield & Thompson, 2007). Another consideration is in being aware of, and managing CRM can add value to a company in the financial area.

Festivals are different from other industries because of their fixed point in time, whereas other businesses with tangible or intangible products often have more than one product or service to offer. This means that if there is a low interest at first, there is always time to build up a customer base and market the product or service as time passes. For a festival, this is not as easy to measure, as normally the festival management will not know how many potential customers are interested until the day of the festival, unless there are ticket sales starting months before the execution. However the full number of attendees will not be known until the day or days of execution. This could be studied using a stakeholder analysis. A stakeholder analysis would aim to discover stakeholder characteristics, positions for and against the festival, level of interest in the festival, and possible support of possible changes of the project (Vaidyanathan, 2012). Securing the customer base would help a festival in the long run as it would make it clearer for the management whether to continue or cancel the festival if there are not enough customer willing to attend or support the festival even before the festival has gone into the planning process. The importance of realising and being able to target the right audience when doing marketing activities is another important management consideration.

Thus the following hypothesis is suggested:



H3: Successful festivals evaluate the economic possibilities before project start based on the customer base opportunities.

### **Resource management**

Resource allocation has several areas to consider when deciding where the resources from a project need to go and also help in set up a baseline budget for the project, or in this case festival. Of the areas covered by resource allocation it needs to consider the number of people necessary to finish an activity, the level of skills in those people, the time it takes to complete a task with the amount of skilled people, and all the equipment, software, hardware and infrastructure to make the festival management capable of completing their tasks and activities (Vaidyanathan, 2012). Resource allocation is especially crucial in multiple-project companies (Hendriks, Voeten, & Kroep, 1999), although it is not as crucial in festival, yet it is still of relevance in order to be ready to finish all activities of the festival by opening day. However it is not just necessary to have an allocation of resources. Project tracking or project monitoring is also a crucial step in a project, as it is involved in measuring the progress of a project in real time (Vanhoucke, 2011). This can be done using a work breakdown structure or WBS, which separates a project into smaller activities, and has the opportunity to track time, cost and performance (Somasundaram & Badiru, 1992).

Therefore, the following hypothesis is suggested:

H4: Good festival management is where the real time resource/monetary use is checked up against the plan/budget vs. at the end of the project

### **Knowledge management**

Knowledge management can be described as “the systematic process of acquiring, organising, and communicating the knowledge of organisational members so

that others can make use of it to be more efficient and productive” (Ajmal, Helo, & Kekäle, 2010, p. 157). Although there is a difference between data, information and knowledge because knowledge is a personalised concept, which needs to be expressed in a way others can understand and use this knowledge, and the only information that can be useful is the one that has gone through some manner of reflection or learning (Alavi & Leidner, 2001). There are several types of knowledge, but the most commonly used types are tacit knowledge and explicit knowledge. Tacit knowledge is the unique knowledge constrained to individuals, while explicit knowledge is knowledge that is easily articulated, codified and shared (Vaidyanathan, 2012). From this we can see there are different uses of knowledge within a company, and also different ways to collect this information that is gathered among coworkers and managers. In ways of learning from projects there can also be different ways of debriefing. Schindler and Eppler (2003) classified these into two groups: process-based methods and documentation-based methods, where process-based methods learn from already closed projects, while documentation-based projects learn from project experiences. Learning from the past can be useful for projects and festivals if processed correctly and furthermore used in future planning and execution of festivals. Additionally, learning from past failures and successes can be of great importance to produce successes in future projects as well (Vaidyanathan, 2012). Although it is not easy, there is a need to efficiently manage the knowledge accumulated from projects, in order to be able to learn from the information (Kasvi, Vartiainen, & Hailikari, 2003). Outcomes of knowledge management can in the best scenarios be to create customer value, operational excellence, and product innovation (O'Dell, Grayson, & Essaides, 1998). Knowledge management can be useful especially in an industry such as festival management, because of its use of volunteers and such that can change each year and add different knowledge with each person.

From this the following hypothesis is suggested:

H5: Good projects document the plan, execution and deviations into an archive for future use and analysis.

Knowledge management is important from project to project or festival to festival. But it can also be used during the planning and execution of projects. Continuous project learning can also be beneficial to companies as it provides a shorter time-span from experiencing to remembering and it can also help prevent having to cut out reviews of experiences because of cost or time constraints (Schindler & Eppler, 2003; Vaidyanathan, 2012). Lessons learned need to be used in further development of projects, and control and tracking measures as mentioned above will show if any parts of a project is not going as planned or if certain aspects need to be changed. By using knowledge management and lessons learned this information could be used in order to make the necessary changes. Therefore the following hypothesis is suggested:

H6: Good festivals learn from what is happening and logically make assumptions, which changes the course of actions.

## **Risk management**

Risk management is a widely researched topic, especially within project management, but rather scarce within festival management. PMI defines in the PMBOK risk as “ An uncertain event or condition that, if it occurs, has a positive or negative effect on a one or more project objectives” (PMI, 2013, p. 559). Sun, Fang, Wang, Dai, and Lv (2008) on the other hand only considers the negative impacts risk have on projects with saying risks are the effects that affect objectives of a project in a negative manner such as cost overrun, schedule delays and deficient safety performance. This shows that

being aware of risks and prepared for them could be beneficial, especially if the risk is of the negative sort. In festivals in particular they are potential places for accidents and other events that could have negative impacts on participants, staff and performers, and possibly cause damage to humans or equipment, infrastructure and the location (Mykletun, 2011). Therefore risk management is an important topic to consider when performing festival management and in the planning stage of festivals.

Risk management can be defined as a process that works to control the level of risk and thereafter works to make the effects of those lessened, where the most common steps are risk identification, risk analysis and risk response (Uher & Toakley, 1999). Risk identification is the starting point when doing risk management and is beneficial in creating a risk register to analyse the risks in a project, the risk checklist is one method to identify risks and can show which risks will have the most impact on project targets (Franke, 1987; Sun et al., 2008). Risk analysis can be done in several different ways. But the most relevant for project management and festival management is possibly the experience within the management team in identifying the risks for their festival and matching those risks to the area of the project, and realising the impact those risks would have on the project (Clark, Pledger, & Needler, 1990). Lastly in the process of risk management there is the risk response. Risk response focuses on developing, selecting and applying different strategies towards the risks to be able to reduce the effects of risks in a project (Zhang, 2016). These three different processes create a way of being prepared for what can happen during the project duration and the opportunity to take actions before rather than after something has already happened. Vaidyanathan (2012, p. 531) concludes that risk management is one of several success variables in project successes, and state that “risks need to be evaluated from the beginning of a project and

continue to be monitored throughout the project progress. All risks need to be analyzed, evaluated, monitored, controlled, and managed for mitigation". This shows an importance of considering risks during the whole duration of a project or the festival management process. Thus we suggest the following hypothesis:

H7: Successful festivals have a risk management procedure in place. Where identifying, plan actions for the risk factors, execution that takes risks into consideration and control measures that consecutively assess the risks during the execution of the festival.

### **Scope management**

Scope has for a long time been included in the "iron triangle" of success factors, where it is believed that to have a successful project it is necessary to measure up against and stay within cost, time and scope/quality (Atkinson, 1999; Badewi, 2015). But as discussed above, there are several different types of success factors within project management. However scope management is still deemed to be an important element of project management and success factors. Product scope has been defined as "the features and functions that characterize a product, service or result", while project scope is defined as "the work performed to deliver a product, service, or result with the specified features and functions (PMI, 2013, p. 105). Though these definitions are sometimes put together in the sense that product scope can be viewed to be a part of project scope. For festivals these two types of scope can be equally relevant as the festival in itself is both the project as well as the product. The theme of a festival often covers many of the aspects of the festival as well as being a part of the activities that need to be accomplished for the festival to be ready for the opening date. Scope definition is an area of project management that gets defined early on in the process of

project management. Often in the preplanning stage in between initiation and the intricate design stage, and studies have shown that a well-done scope definition in the preplanning stage can be a major part of project success (Cho & Gibson Jr, 2001). It is important to have a clearly defined scope, and can also help in avoiding major parts of a project is forgotten or missing (Clarke, 1999). According to Kerzner (2013) and PMI (2013) it is important for project management to monitor scope creep and develop proper plans for controlling and manage any changes to scope. Thus we suggest the following hypothesis:

H8: Successful festivals have a clear and thorough scope with control mechanisms that prevent slippage of the scope

Scope management is a part of the project charter in the project integration management area of project management. The project integration management evolves around the processes and activities that work on identifying, defining, combining, unifying and coordinating the different processes and activities throughout the duration of a project (PMI, 2013). Under this integration management there are several different processes and procedures, but the most relevant in this particular setting is the project charter. The project charter is a document that authorise the project, and involves project objectives, benefits, and benefits from the project (Vaidyanathan, 2012). This is something that needs to be done before being able collect requirements necessary for the project. The PMBOK Guide defines a requirement as “a condition or capability that is required to be present in a product, service, or result to satisfy a contract or other formally imposed specification (PMI, 2013, p. 558). From this we see that in order to start or finish a project there are certain prerequisites that might need to be present or

accessible. In accordance with scope management, the project charter and necessary requirements of the festival another hypothesis is suggested:

H9: Defining what needs to exist, what needs to be done, and what plans to be done before the festival is planned and executed.

### **Project management tools**

Project management tools are a collection of tools that can be used throughout the entire project management process. The PMBOK Guide talks about the seven basic quality tools that are used within the plan-do-check-act cycle in order to work on quality related problems within project management (PMI, 2013). These seven tools are cause and effect diagrams, flowcharts, check sheets, Pareto diagrams, histograms, control charts and scatter diagrams. Other tools used in schedule presentations include bar charts/Gantt charts, milestone charts and project schedule network diagrams (PMI, 2013). Payne and Frow (2005) found that the most used tools and techniques used in small and medium sized firms were project teams, project planning, Microsoft project, Gantt charts, and change control processes. The techniques mentioned here have all been mentioned above. However the tools, Microsoft project and Gantt charts are tools used in project management. Gantt charts are one of the most popular project management tools and probably one of the most known tools even though they have been around for over a century (Wilson, 2003). Though a Gantt chart should not be used in all types of projects as they should be used in a contextual and reflective manner in projects (Gerald & Lechler, 2012). Earned value analysis is another technique or tool used to control and evaluate cost performance of a project (Howes, 2000). As mentioned, project management tools can be used in the entire process of planning, execution and closing of a project; therefore the following hypothesis is suggested:

H10: Good festivals will use and take advantage of project management tools where possible.

### **Project manager and project management team**

Project management teams are mentioned several places in theory of success in project management theory. In Pinto and Slevin (1989), in Figure 1 above found that personnel are important in the opening and closing stages of a project, and they also found a pattern from research, which shows the importance of competent project managers and competent project teams (Pinto & Slevin, 1987). Other studies that mentioned the importance of project managers and project management teams to project success were (De Wit, 1988), (Belassi & Tukel, 1996), and (Hoegl & Gemuenden, 2001).

However some studies have also shown that personnel factors are not as significant in project success, but this is speculated to stem from the development of modern companies where projects are permanently fixed within a company (Belout & Gauvreau, 2004; Pinto & Prescott, 1988).

Project manager competence as mentioned is another factor that can be a part of leading to successful projects. Project manager skills like leadership, problem solving, people skills, and communication skills are important and can be critical to project management competence (Brill, Bishop, & Walker, 2006). The PMBOK Guide also discusses the necessity of project managers to balance technical, interpersonal and conceptual skills project manager when leading a project. The interpersonal skills mentioned include leadership, team building, motivation, communication, influencing, decision making, political and cultural awareness, and negotiation (PMI, 2013). Though previous experiences will also be of essence to project manager competence.



Hence, from this we suggest the following hypothesis:

H11: Good festivals have competent managers, and a well-designed project management team.

These areas of project management have been deemed by the author to be the most relevant to festival management and mentioned success factors, and have therefore been developed into hypotheses that the analysis of the interviews will work to either accept or reject.

## Methodology

### Research design

There are three different types of basic research designs; exploratory, descriptive and explanatory or the often used term causal. Exploratory research wants to explore new areas with little or no previous research to get a basic understanding, descriptive research wants to get a clear and highly accurate picture, while causal research wants to explain why events happen (Neuman, 2011). Based upon these descriptions led to the choice behind the research method for this study. Festival comparisons in general are not researched much as mentioned above. And festival management within a project management context does not have a large focus within project management research either. By using the exploratory research method the hope for this study is to find principles and success factors more relevant to festival management within a project management context, which are not well researched previously.

### Qualitative data collection technique

Within the exploratory research method there are two choices of data collection, quantitative, which gathers information based on numbers, and qualitative, which gathers information through words or pictures (Neuman, 2011). Because of the nature of exploratory research and the somewhat unexplored topic of festival management comparison, the qualitative data collection technique was chosen in order to be able to get a basic understanding of the matter at hand (Reid, 1996). The semi-structured interview method was chosen in order to gain the data from the festival managers in a manner where they could talk freely and include every aspect of the management of festivals, as they desired, but at the same time receiving the same set of questions in order to compare and analyse the answers by the researcher, and at the same time get reliable data (Bernard, 2011).

### Semi structured interviews

The objective of this thesis is to get an understanding of the management of festivals and into the decisions and strategies of festival leaders that can lead to long-lasting success for a festival. Semi-structured interviews have been deemed the best fit in order to obtain the most relevant answers in order to discuss the research question in the best manner. And also because the possibility for the interviewees to talk more freely and add aspects that they deem important to the study. These interviews were to be conducted either through Skype, or face-to-face where possible, but because of time limitations telephone interviews were also conducted. Even though face-to-face and Skype interviews were preferred because of the ability to spot body language and facial cues, telephone interviews can be a good substitute based on the circumstance, which is also supported by the literature (Sturges & Hanrahan, 2004). However there should

have been a second interview round in order to discuss further the answers and fill in holes from the initial interviews, yet this was not possible as mentioned before the interviews were conducted in spring, which was when the intensification of festival planning and activities occurred, and also time limitations of the researcher.

### **Festival criteria**

Getz (1989) categorised special events with these criteria: open to the public, the main purpose is celebration or display of some sort of theme, occur once a year or less, predetermined opening and closing dates, infrastructure or permanent structures are not owned by the event, the programme consists of one or more activities, and lastly all activities take place in the same community or tourist region. For the purpose of this study, similar criteria will be used to decide which festivals should be chosen to be interviewed. An additional criterion will be added; the festival has to have existed for 10 years or longer in order for it to be an established festival, and more probable to have already set routines and schedules for management practices.

The festivals are to be located in Norway, an established festival 10 years or older, a set date every year, and the activities offered can include a wider range of people, which makes it more open to the public.

### **Sample selection**

The sample for this study was selected using a purposive sampling as this method of sampling chooses objects based on certain criteria (Neuman, 2011). As mentioned above the festivals fit the criteria of having to be established, 10 years or older, have a focus towards the public audience, a range of different types of festivals and all located in Norway. The purposive sampling method was used here because of the maximum variation sampling and criterion sampling (Given, 2008), which makes sure the range of

festivals covers a wider sample and criteria as mentioned above. Additionally there are not an abundance of festival managers leading established festivals in Norway, which also led to the choice of this method of sampling.

The sample consisted of two food festivals, one film festival, one jazz festival, one extreme sports festival, one arts festival, and four music festivals. These proved to have a range of management groups, locations and start-up years, but all fit the criteria. The food festivals included in this study mentioned that their exhibitors are actually their customers as they are public festivals and open to everyone without selling tickets in the traditional way. Their focus is culture and presenting it to the public in the correct way rather than on for example selling tickets. However they are still included in this study as they are open to the public, and fit the rest of the criteria. An additional festival was interviewed but was disregarded because it did not fit the criteria of being a public and visitor focused festival, as it had more of a TV-production structure in the management and planning process.

The sample is small, but since it is a qualitative study, the small purposeful sample of chosen respondents provide the information rather than being representatives of a larger population (Reid, 1996). There is little information of how big is too big or how small is too small when sampling in qualitative studies, but this can be more a case of evaluating the information attained through the interviews rather than the size of the sample (Sandelowski, 1995). From this, it is believed the sample size is adequate for the exploratory purpose of this study.

Key employees in the festival management groups were selected, primarily the festival managers, because of their involvement and expert knowledge in the management process of said festivals.

## Data analysis

11 semi-structured interviews were conducted in the period of February-March 2016, whereas 1 was disregarded. These interviews were conducted in Norwegian through Skype conversations, telephone and face-to-face interviews. The interviews ranged from 20 to 60 minutes, based on the ability the interviewees had to talk freely. The data analysis was based on the steps suggested by Hesse-Biber and Leavy (2010) of data preparation phase, data exploration phase, data reduction phase and interpretation. The data preparation phase involved taping the interviews and transcribing them. There were also notes taken during the interviews in order to see if a pattern emerged over the course of the interview process. These audio files were listened to thoroughly and rewound in order to get the most correct representation of the interviews conducted. These transcriptions were for the analyses by the author and for the presentation of quotes and are not attached to this study. The data exploration phase was already started in the note taking during the interview process, however the transcription process also made the author work on the patterns and these thoughts were written down for later discussion. The data reduction phase in this case consisted of putting the relevant answers into tables and categorising them into the topics they belonged to. As a comparative study the purpose of this was to see the similarities and differences among the festivals interviewed in order to see if it was possible to answer the research question. The last step is the interpretation of the reduced answers in the comparative tables. These tables are the basis for the findings discussion later in this paper.

## Reliability and Validity

Reliability and validity considerations are different in a qualitative research context compared to those of quantitative research studies. Neuman (2011) describes reliability as dependability or consistency, and use several techniques like interviews, participation, photographs or document studies. While validity is described as truthfulness, however in qualitative studies authenticity is a more relevant concept than being truthful. Validity also covers internal and external aspects. Internal validity is the question if the study is replicable, where a new study would find similar results, whereas external validity discusses the generalisability, whether it is possible to generalise in other settings and people (Willis, Jost, & Nilakanta, 2007). However qualitative research do not normally seek to generalise findings, as their focus is to study an issue or phenomenon to a certain group and hence generalisability is not often expected from qualitative research (Leung, 2015). However measurement validity in qualitative research are established in other methods. Leung (2015) states that validity means that the tools, processes and data are appropriate for the purpose they are used for. The importance of choosing accurately is more important than to be able to generalise findings. He also found in theory several methods of increasing validity in qualitative research. These are triangulation of both researchers and resources and theories, materials and processes having well-documented review paths, multidimensional analysis as concept- or case-orientated and respondent verification (Leung, 2015).

Nevertheless it is also necessary to be aware of threats to validity. Threats to qualitative studies are based in error and the major sources of error were found by Brink (1993) to be the researcher, subjects participating in the study, the situation or situational context,

and the data collection and analysis methods. These factors are important to be aware of when creating and conducting studies within qualitative studies.

In this study considerations to reliability and validity were taken. Semi-structured interviews were selected as the best fit for the purpose of the study, to compare established festivals. The questions used were based off of the hypothesis and success factors from previous studies, and discussed in order to create questions that would be able to get as much information from the interviewees that could create a basis of comparison between the festivals. These questions can be reused in further studies in order to widen the comparisons of festivals. Additionally, the interviews were taped and transcribed; they were rewound and listened to carefully in order to create the best depiction of the data provided. The researcher also compared own findings to previous research findings and these results were consistent, though considerations were made to the nature of festivals. It is believed that the results from this study are reliable and valid.

## Findings

The obtained sample was collected using purposive sampling, where established festivals over 10 years were chosen based on a range of criteria. The achieved sample is presented in Table 1.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Location	Voss	Molde	Larvik	Tromsø	Harstad	Giske	Stavanger	Bergen	Oslo	Ålesund
Start up	1997	1961	2001	1991	1965	2003	1999	1993	1999	1984
Arranged every year since	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Visitors last year	Ca. 20.000	5-60.000 visitors, 24.000 tickets	25.000	60.000 tickets	25.000	15.000	Ca. 4-50.000	Ca. 30.000	85.000	Ca. 40.000
Volunteers	7-800	Ca. 650	1200 (includes sports teams)	320 in January festival	100-150	200+	90	Ca. 400	Ca. 2500	Hire high school students/student businesses
Festival managers	4 or 5	6, volunteers before 1988	3	3	About 15	New position for the last 4 years. 2 founders before that	3	1 from hired event company	2, first one had been there since the beginning	Around 10

Table 1. Demographics of sample

The festivals will be discussed by using abbreviations, which are initials created by the author. The full names will be shown in appendix 3. This approach was chosen in order to focus on the comparison of the festivals, to fit into the tables, and try to limit confusion when discussing the festivals together.

As mentioned above, the sample consisted of 10 established festivals in Norway. A range of festivals from all over the country were chosen for variety. And as Table 1 shows; a variety of visitor numbers and start up years. All festivals except one festival used volunteers in planning and execution of the festivals, though used high school students involved in student businesses instead. The amount of volunteers used also produced a variety of numbers. The interviewees were all festival managers, except one who was festival coordinator and was in charge of the festival part of the festival, which also included a sports part. For an insight into the amount of managers who have put



their impact on the festivals the question was asked of how many managers throughout the years of each of the festivals. From Table 1 we can see that this is also quite varied and, it is not necessarily based on age of the festival how many festival managers there have been throughout the years of existence.

## Quotes

The findings from this study will be presented henceforth. Quotations will be used heavily showing the sort of answers obtained through the interviews with the festival managers/coordinators. The quotes will be displayed in the text in italics and, are translated by the researcher from Norwegian to English for the presentation in this thesis. Whereas the original quotes are located in Appendix 2, if clarifications are needed. Simple comparison tables will also be provided in order to show more clearly the comparisons discussed.

## Customer base management and financial possibilities

Analysis of customer base and studies done by the festivals seemed quite dependent on the festivals themselves. Some had quite extensive customer surveys yearly, while others were based on experience and own assessments based on last year's results and running assumptions throughout planning and execution of the festivals. Some also took advantage of a combination of experience and surveys in order to estimate their customer base and financial possibilities. Several mentioned having a loyal audience who returned year after year, where bringing family and friends with them when they returned. SFG have analyses on "cannibalism" of own festivals and the same customer base, as they are an among many things an event company located in a smaller city in Norway. For them these studies are important in order to be aware of

how the customer base can be the same for more than one festival arranged by the same company.

“Knutepunktsordningen” was a topic that got mentioned in several of the interviews. This was a government funded support system given to 16 festivals in Norway that were leading within their area, and these festivals would be secured millions in support of their festival each year. This arrangement was closed down by the end of 2015, which meant those festivals had to go back to fighting for the funds with the rest of Norway’s festivals (Suvatne, 2015). Three of the festivals discussed in this study were a part of this system, which might prove to create financial issues down the line as indicated in the interviews. By being a part of this system, these 3 festivals have had a high sense of financial safety and lower uncertainty before starting the planning for the subsequent festivals because of their automatic support from the government. The consequences of this could be discovered further in future studies.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Financial possibilities and customer base	Good financial analyses. Especially on sports. Hard to study customer base because of little registration of visitors. Working on creating a portal that will provide good data	Yes to a certain degree	No. Have a customer base in continual change. From experience know the audience	Use customer market evaluations to find strategies in the long	Have done audience research but focus on sponsor market evaluations. Also analysis on business sector for future collaborations	A lot of analyses. Especially on cannibalism between own festivals. By using pre-registration of attendees can calculate how much money will come in from each family.	Project based and can only do project based on finances coming in	Make own assessments	Yes, have yearly comprehensive market evaluations	Yes analyses or to find basic income and costs to know if safe.
Information from analysis used to plan festival	Yes	Yes analysis based on experience			Yes in what to offer visitors and how to meet widest market range					Yes especially results and developments from previous year
Analysis or experience	Experience of how proceedings will turn out but aware of new customer groups	Analysis based on own numbers and experience	Demographic evaluations but not every year	Experience based. Loyal customer base.	Experience based. But do analyses to realise wider audience potential	Customer study	Experience. Focus on family groups	Consecutively assessments	Yearly comprehensive study	Exhibitors; evaluation forms of experience
Analyses change planning or scope					More institution than festival	Yes	Yes, financial considerations	Yes		

Table 2. Customer base and financial possibilities comparison

On customer base surveys: *“You often have to adapt ... you cannot land on something and go with that, it is a continual process”* – ØF

On customer base surveys: *"but we consecutively do pretty substantial surveys of the sponsor market if you can say it like that. It is an important market for us internally"* - FINN

On customer base management: *"Considering we have had this festival for so long in a way we have some basics, we are pretty sure we know how it will work"* – ESV

On information from economic analysis to plan festival: *"Yes, the most important management tool we have are the results and development from last year"* - DNM

On Knutepunksordningen: *"knutepunktordningen got cancelled in December 2015 ... a very considerable change ... of the entire financing structure for festivals in Norway will be altered because of it"* - FINN

## Risk analysis

Risk analysis was one of the topics all respondents agreed upon was an important part of arranging a festival. Especially safety, which was the overall agreed upon risk analysis among them. Some of the respondents also had financial analyses or considerations, however that was not a focus for all. The risk identification was discovered either through expert teams from within the festivals or through external safety and security personnel. Experience was also included in these analyses as a part of risk identification. The festivals that hired external safety and security firms hired them to be in charge of these parts of the festival in order to be sure it would be done well and professionally. The interviewees that were asked if these risk analyses were involved in the planning of the festival all agreed that this was something that was included in the planning.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Risk analysis	Yes safety and economical analysis	Yes safety	Yes safety, hire safety personnel	Yes but do not call it that, also experience	Yes safety	Yes on everything. Safety and logistics. Hire external security personnel	Yes before and during festival. Well-planned plan for it.	Yes safety and an financial analysis	Yes, safety and financial analysis, hire external personnel	Yes safety and financial analysis
Risk identification	Expert groups for each activity put together. ROSS analysis.	Depends on the topic, calculated risks	External company. Often a part of the festival to be responsible for the major topics		Production team in charge of their own identification	Partly analysis and partly experience including the external personnel	Experience and plan worked out with emergency services and experience from training drills with emergency services	Experience based	External personnel	Experiences and exhibitor information
Use analysis results in planning		Yes have a plan that gets used in training and different scenarios	Yes					Yes	Yes very much so	Yes

Table 3. Risk management comparison

On risk analysis: *“Yes there is a lot of risk analysis. A lot of safety work. You have to have it with what we do ... identifying, there are groups who get put together or persons get put together to, that have an extensive knowledge to the particular activity. If it is the festival or a kayak sport, and then they have to identify the risks in the particular activity they work with, and that goes into the safety plan” – ESV*

On safety and financial risk: *“... well we normally have a HSE (health, safety, environment) plan that is worked through and is good. And that focuses on safety concerning things, which are of course important ... We have a budget we deal with and in that there is a financial analysis and expectations, so it is varying what where you end up each year” - BF*

On risk analysis: *“... risk on anything that can arise and could happen ... but the weather and audience is clear, there is a lot of risk, otherwise it is a nice and calm festival with little drunkenness and alcohol and those kind of things, but we spend a lot on safety and security, and safety and safety management, we have very professional people there. They are services we buy externally... they know what they are doing, and know everything from transport logistics to performer safety, crowd safety, crowd management” – SFG*

On risk analysis: *“... we performed a consequence analysis of it and concluded that we could not do it even though it did not meet the numbers last year. We just have to do it in a slightly different way” – MJ*

## Prerequisites

Prerequisites was a topic that seemed to provide indications of either no prerequisite at all or on the other hand having financial considerations in order to start

planning the next festival. Yet some of the festivals were already being planned before the current year's festival was even finished being executed. But one subject they all agreed upon was that experience was a part of finding out what had to be a part for next year's festival. A few of the festival managers started working on next year's festival before the execution of the current festival is closed down. The only festival that actually had more prerequisites other than financial was ESV as it is a sport based festival. This means that there are several conditions for the different sports to be able to go through and give a green light. However these considerations are during the festival execution and not before the planning of the festival is started. Established festivals like the festivals in this study have been around for many years, in this case over 10 years. And from the results there are not too many prerequisites that need to be considered for the festival planning to start. The only two festivals that actually mentioned finances were the two food festivals interviewed.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Prerequisites	Need to have done most of the planned activities before execution. Same with sports, there needs to be certain conditions for them to start	Follow template and use experience of team and volunteers	No. Starts next festival before execution is finished on current year's festival	Date and location already decided so no other considerations of prerequisites	None. There will be a festival regardless	Financing from sponsors	Financing	A mix of budget and performers, as it all depends on the budget	None, will be executed regardless	Basic financing
Question to put up festival	No	No	No	No	No	No	All based on the financial status	No	No	Basic financing
Experience used for prerequisites for next year's festival	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Prerequisites broken lead to change in planning	Yes can change days of sports							Of course, it is natural, an on going assessment		

Table 4. Prerequisites comparison

On prerequisites: *"If it had not been for the sponsors there would have never been Sommerfesten, or any other festivals"* - SF

On prerequisites: *"... the festival keeps going ... whether or not people show up or not. But we do of course have to do some strategic considerations, and if you have a really bad year*

*like we for example had last year, a very bad visitor attendance year ... then you of course have to do analyses on behalf of that and correct the course” – FINN*

On prerequisites: *”There has to be a fundamental financing. And that is the challenge” – DNM*

On prerequisites: *”that is a little difficult to answer because there is no minimum, well, we just know there will be arranged a festival no matter what. It is not like, well, there are many smaller festivals that have to consider it, but we have in a way never, well the organisation is so big that it is not something we reflect upon, if we are going to arrange (the festival)” – ØF*

### Decision to plan next year

The question on whether or not to start planning next year’s festival was in accordance to questions on customer base and financial possibilities analyses, but also on prerequisites. It was a follow up question, which indicated not all of the interviewees, gave lengthy answers to this question. However of the ten, all asked except for the two food festivals agreed upon that there was never a question to them whether or not to start planning the festival for the following year. The two festivals were concerned about having a financial basis in order to start planning the festival. It was clear from the answers that these festivals were strongly established and a question of not arranging the festival the following year was just not a discussion among the management teams.

On question of arranging again the following year: *”... we were until recently in the system and we have been a “knutepunktfestival” for 20 years. And then you have a safe spot in the country’s budget and you are in a way less vulnerable for fluctuations in the market. So you are very institutionalised in a way. So we are therefore less vulnerable for lack of visitors and those kind of things, so it is a very solid financial shape” - FINN*

On arranging the next year: *”It is a risky industry and we do the assessments we feel we can do, but we have never considered not to arrange the festival because of bad times or things like that. But it is for sure a consecutively consideration, it is” – BF*

On arranging again: *“well, there are many smaller festivals that have to consider it, but we have in a way never, well the organisation is so big that it is not something we reflect upon, if we are going to arrange (the festival)” – ØF*

## Scope or identity

Scope of the festivals is in this study used as identity of the festivals as this was how the festivals understood the scope concept in relation to festivals. The scope of the festivals had a range of emphases in what they want to promote and put a focus on. It was a topic that was hard to define for the managers as many mentioned it all depended on whom you ask within the festivals and what they personally believe is the identity of the festival. It is something that is very much discussed, but not necessarily set in stone according to the interviewees. Especially in the art festivals it was very much dependent on the artistic vision of the manager what the end product would look like, and also what the vision of the festival would be. Others mentioned the social aspect of festivals, the conveyor or promotion aspect, and the core of the festivals. Some also mentioned having a wide range of the theme and performers, and also a wide range of the audience they target. However this was a topic that is greatly discussed among the festival managers and the festival teams involved in planning and presenting these festivals.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Scope or identity of festival	The sport is the core. It can be either sport and keep up the quality, the social aspect of it or the video production. It depends on whom you ask. Vision to be best extreme sport event. Wide program for wide range of audience	Been living up to "knutepunkt" festival standards for years. Artistically leading and a wide range of performers.	A wide range of performers for a wide range of audience. Social aspect and a meeting place.	Program committee with different taste in movies, which complement each other. Current topics that are relevant to the social debate. Use the movies to illuminate topics	Each festival manager makes it his or her own artistic vision. Core is art and culture	Peace, Love and Understanding. To be there for each other. A festival for everyone, from 2 to 80 years old. More than just music.	To be the most important conveyor of food culture. To be a place where producers can meet the consumers, and work to enthuse people about the food culture	The history and take care of it	To be the best and most important music festival in Norway. To be an alternative to international festivals. But also a focus on volunteerism and the environment	A focus on Norwegian food from Norwegian products sea and land. Where you find farm products not sunglasses and liquorice

Table 5. Scope or identity of festivals comparison

On identity: *“When you take that part of it, the identity part then you will get different answers depending on who you ask. Right? And that is not just the audience, but you can ask us in the board then you will definitely get 5 different answers there too. It all depends on who it is and what background there is right?” – ESV*

On identity: *“... well it is a wide festival that gather a wide range of age. So it is music for every ear in a way” – SF*

### Scope creep

Scope considerations proved to be difficult to compare, as the question of scope and festival identity was either very broad, or not thought through among the festival managers, as several mentioned it depended on each person who was asked, whether it was the festival managers, the audience or the festival founders. And it was also difficult to determine whether a scope or identity had been set. Scope creep on the other hand was more easily comparable. The majority had considerations of how to avoid scope creep of core beliefs and what the festivals were known for publicly. The festivals appear to have a focus on keeping the festivals close to the core of what the festival wants to produce or promote towards the public. Yet at the same time follow the direction of development and develop based on what the customers want and which direction their core/niche is headed.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Scope creep	Yes will not have motorised sports	Might change to modify to financial situation		Yes in a way	Can change from each festival manager	Yes	Yes	Yes	Yes	

Table 6. Scope creep comparison

On scope creep: *“It is more related to, well if we have too much on our plate, then we always try to tighten and work with the music, which is sort of our main message and main direction” – ØF*

On scope creep: *“And then there is this concept of “spleising” (splitting the bill), “spleis” is one of those words people have not heard of internationally, just like dugnad (volunteer work). What is that? It becomes pretty exotic for many. So that is the most important*



*bearing element that vi never can mover away from, that would ruin the whole thing” - SFG*

On scope creep: *“Then we can say that the sport in what we do is the core. I think everyone agrees on that, that it is in a way the core ... One thing we will not do is to do motorised sports where the athletes do not use their own bodies to do their sport. We have chosen that as a criterion” – ESV*

## Unexpected events

The answers to the question of how the festivals handle unexpected events were in this case one of two actions. Some had a plan they put to use and were prepared for; others used experience and gut feeling to handle those kinds of situations. Some of the respondents indicated the importance of planning well and being well prepared in case those unexpected events happen, as they tend to happen quite a lot in festival management. A few also used the evaluation phase to discuss these unexpected events in order to be better prepared for next year’s festival or figure out how to avoid it from happening again.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Unexpected events. Use of information	Gets put into evaluation and discussed	No, unless under contingency plan	Yes	Experience in team, good communication for decision making when matters happen	Put into evaluation after festival	Evaluate all parts of festival. Plan well for smooth execution	Plan for the unexpected	Yes, try to use it	Plan for different types of unexpected and expected events	Yes
Change plan or based on experience/gut feeling	No but does get changed if it does not work, continual development	Contingency plan for security	No, often gut feeling	Working on building experience in crowd management, theatres used do have plans	Gut feeling and experience used extensively	Experience, if events happen several people make decisions, need good communication	Team knows what to do and keep up communication	Plan but important to know how to use the plan.	Plan through risk management	Has a process that leads to adjustments
Analysis behind causes of events	If anything fatal happens there will be an investigation. Easier to evaluate after events happen		Saves information and uses it if needed		The technical area does with safety management and plans	Some analyses get done.	Just discussed loosely. Good technical team. Write reports afterwards for use in later planning	Have tools, and often analyse by using security cameras, etc.	Evaluations of good and bad but can do changes from day to day if necessary during execution	Experiences and evaluation notes

Table 7. Unexpected events comparison

On unexpected events plan: *"... we have so much experience that we know what do to do if something happens. We are very much solution oriented, it is a very positive group of people that are trained and by nature able so see solutions to the problems we do have. That is an important trait we have brought into the (organisational) culture"* – SFG

On unexpected events: *"Oh that happens all the time. We have planned well for the unexpected though"* – GM

On unexpected events, use of information: *"... we actually have a sort of continuing evaluation during the festival when it comes to next year's planning. So a lot of the discussion when the festival is under way in the festival location is to see what we can improve and adjust"* – DNM

On unexpected events, use of information: *"Yes of course we do. It would be stupid not to do that"* – SF

On using information from unexpected events analysis: *"... and tries to make use of the information we acquire, sure. Something else would be meaningless"* – BF

On unexpected events, use of information: *"... we spend a lot of time on evaluating every part of the event. And then all these people with responsibility for their area present what went well and what did not go well, and everything in between. Then we evaluate; why did it happen and what can we do to avoid it happening again? That is really important"* – SF

### Annual cycle and planning

The annual cycle seemed quite conclusive among the interviewees in terms of phases mentioned in the interviews. The three most mentioned phases were evaluation, planning and execution. Other phases that were mentioned were clean up, rest for the management team, closing and sponsors. However the one phase that was all conclusive among the respondents was the importance of the evaluation phase. All respondents indicated that an extensive evaluation phase after festival closing was a part of the annual cycle and important before next year's planning. Key phases were either indicated as the phases mentioned in the annual cycle, or that all phases mentioned were equally important. And several of the respondents mentioned that there were no

key phases as all the phases and activities were necessary in order for the festival to be able to be executed.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Annual cycle	Made in cooperation with the board, from strategies, etc. Defined time periods to do sponsor work, evaluate, plan for next year, execution. 3-year strategy plan, which is the goal.	Clean up, practically & economically. Closing of previous festival. And escalation of new festival. Evaluation in autumn. New year escalation of new festival. Escalation of planning and execution of festival.	Starts before festival is finished; artist booking. Early marketing phase with ticket sales. Evaluation phase. Budget phase. Recruitment. Marketing and execution.	Clean up, group evaluation, and then proper evaluation phase. Planning at the same time. Execution.	Evaluation phase, planning phase, escalation of activities and lastly execution.	Evaluation phase, which leads planning for next festival. Control meetings once a month, also creative meetings. By new year sponsor work is clear. Specific budget set. Then escalation of team.	Evaluation and reports. Analysis of market and customer base. Exhibitors, sponsors for financing, marketing in spring. Escalation of marketing and hiring of team. Execution.	Starts before festival is finished to plan artist booking. Evaluation. Planning phase, which escalates closer to festival. Use evaluation when escalation of team starts.	Evaluation phase. Administrative and strategic work. Planning of festival. Escalation of team and work until execution.	Evaluation. Budget in January, planning and invite exhibitors, last few months detail planning and execution.
Key phases	No priority, all need to be done	Evaluation, clean up and starting planning of next festival	Equally important	Clean up, rest, evaluation, planning and closing		Evaluation, sponsors, artist booking for marketing purposes		Equally important	All important in order to be able to execute well	Financing, exhibitors, execution

Table 8. Comparison of annual cycle

On the annual cycle: *"... it really starts before the festival with next year's season. In relation to having a look at the performer market ... finding out who is going where"* – SF

On key phases: *"... there is no main priority among them, everything has to be done to execute (the festival)"* – ESV

On annual cycle: *"Well there is clean up, rest, evaluation and planning, if we are going to talk about main phases. And then we get back to closing"* - TIFF

On annual cycle: *"... and then the planning process begins, in relation to that it goes steady all year and then it escalates the closer we get (to the festival), that is natural"* – BF

On planning and adjustment: *"...we do actually have a kind of ongoing evaluation during the festival when it comes to next year's planning. So a lot of the discussion is when the festival is running and we go to the festival location to see what we can improve and adjust"* – DNM

On planning before: *"I tend to say that the evaluation is half the planning. Because it is in that phase we find out what works and what did not work and what kind of needs we have to modify or change"* - TIFF

On planning and information sharing: *"And there is a difference in a festival organism and any other business. Any other business has 365 days to make mistakes and correct"*

*mistakes. Everything needs to be right when we open. And then the whole basis is presented in 7 days” - ESV*

## Documentation process

The organisation of the documentation process ranged from having very little consideration to high consideration in the festivals. But the festivals with very small management teams and a smaller extended staff during the festival execution tended to have little considerations to the documentation process, while the festivals with very large teams during the festival execution tended to indicate the importance of having a well-functioning documentation process. Online services for sharing and storage of this documentation were the majority; however some also had internal systems where this information was stored and accessible for later use. Online systems like Dropbox and Google Docs were the most commonly recognisable systems for storing and sharing information. Another project management system also mentioned was called WebBusiness.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Documentation process	Yes	Yes	Yes, sort of	Only meeting reports	Yes	Yes	Yes	Yes	Yes individually during the year, and collectively after the festival execution	Yes only certain elements
Where information is stored	Dropbox	WebBusiness and arena documentation on Google	Dropbox and Google Docs	Internal server everyone in the team has access to	Internal server everyone in the team has access to	Google Docs	Internal server	Project management system, internet based.	Google Docs	Stored locally on computers.
Project template	Yes, a few. Important, especially for when losing or gaining a new team member.	Yes	Yes, for budgeting and follow the lists.	No	No, but have a project management tool used in production of the festival	Yes	Uses experiences from previous years	No, a combination of experience and a template	No	Sort of, uses experience and previous years' festivals

Table 9. Documentation process and project template comparison

On documentation process: *“So information sharing is, it is alpha omega when you have 3 people who work all year and then you have a 1000 people that work for a month. If those 1000 people are going to be able to do their jobs well in a short, limited period of time then*

*they have to very effectively get information enough to do the job they are going to and very effectively be able to contribute to the system, the organisation that all the 1000 people are inside across departments and those things right?" – ESV*

On documentation process: *Google Docs. Yes. That is what we use the most. That is where we put in who is responsible and the status of the process. All event and at least these big festivals have pretty large and open sheets. So that is where we pay attention to everything" - SFG*

On documentation process: *"Yes we have a documentation area that is open to the team. And we also have filing routines and we have, again we are so big that we have our own administration management that take care of in a way all the information that comes into the office and we also have a shared documentation area that in a way handles information internally" – FINN*

## Project template

The opinion of having a project template among the festivals was split in half. Half of the respondents had a template of some sorts for planning the festival, while the rest based their planning on experience and knowledge from previous years. Only one mentioned that they had a mixture of a template and experience, however as mentioned with experience and festivals above, it can be concluded these templates are a creation of experiences from previous years put into writing.

On festival template vs. experience:

*"... it is a combination, and we definitely have a template" – BF*

On project template: *"No we do not have, we do not have a template, we do not, but we have a project management tool that is digital that we use in the planning of every single project we are working on, if we can define the latest productions as a project" - FINN*

On project template: *"We have a template in Google Docs that is based on previous experiences where absolutely everything of work activities are written down, down to the detail level. It is kind of copy paste, as you just reset the template and start over" – SFG*

## Own opinion of longevity and success factors

The last question asked in the interview covered the festival managers' own opinions on why their festivals had succeeded in staying in business for as long as they had, as a comparison to previous research and the answers from the interviews. The answers ranged from being unique and having met a niche to something the audience feels connected to, and to being professional and having strong programmes during the execution. Every festival manager had their own distinct opinion on the success factors, which makes it clear the success factors in literature are not necessarily considered in management decisions in festival management. At least that is what the results from this study indicates about the festival managers' own opinions of the longevity of the festivals they are managing.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Own opinion on longevity	Right timing to start. Good timing since. Good location. Great volunteer spirit in locals. Own video production company. Good board work. Professional staff.	Solid program and the ability to renew the festival	Meeting place and niche festival. Not many competitors in the area. Wide audience. Bold choices in artist bookings.	Good movies, good programs. The frame of the festival and the atmosphere. It draws people in.	Unique profile. Important regional function for art. A meeting place and development creator. Unique offer with not many competitors. Professional and experienced staff.	The story is important. Everyone locally knows it.	People feel a connection and ownership to the festival. Importance of communicating contents of the festival to the public.	Combination of stubbornness and appreciated by the city residents. Ability to change and revitalise the festival. Meeting place.	Thorough and professional, but main focus is music as the core	Strong identity of the city and a wish to keep it going

Table 10. Comparison of own opinion of longevity and success

On success factors:

*"But I feel like the timing was good, and the timing those years have been good. A second success factor you cannot get away from is the location as a base" – ESV*

On success factors:

*"... I think it has a lot to do about profile, that one has been unique, with Bergen International Festival one has in a way been unique in the festival industry because one covers such a large artistic area" – FINN*

On success factors: *"... we kind of have our niche. That we do not have any competition in the area... so we meet a wide audience, and then there is the development. We have worked hard with development. And that also includes brave financial gambles, in relation to booking expensive performers" – SF*

## Experience

Experience and having knowledge of the festivals seemed to be a red thread throughout all the interviews. Having management and a project management team, and even experienced volunteers were seen as both helpful and necessary to be able to run the bigger festivals year after year. Knowing what to do and be able to think on their feet was also something appreciated by the managers interviewed. And even though most of the festivals had some sort of documentation process, there seemed to be quite a lot of experience and knowledge within the management and team that would be lost if one or more members of the team disappeared from their role within the festival.

*On experience in staff: "And then you get staff replacements and then some of the experience is missing too. But then it is a little important to have some evaluation notes that are left from the previous years. Then you can see what has been tried that did not work" – DNM*

*On experience: "... the experience is extensive and one knows what it takes. Because it is scary if we have to change anyone in the staff, so I hope it does not happen for a while" – SFG*

*On experience: "... the experience within both the administration and the board, and not the least in the volunteer organisation here is very valuable to be able to create the festival" – MJ*

## Project management tools

Most of the interviewees had heard of project management and the use of project management tools. However not all used them consciously or knew them by the term "project management tools". Some kept it on an internal level, while others used online services like WebBusiness or Basecamp for project management tasks, and Google docs or Dropbox for storing purposes. However all respondents used some kind of tools in



coordinating planning and execution of the festival, but not necessarily project management tools.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Experience or heard of project management	Yes	Yes	No	Yes	Yes	Yes	Yes	No	No	
Use project management tools	Yes	Yes	Excel and lists	No	Yes	Yes	Yes	Yes	No	Office package and email

Table 11. Project management tools comparison

### Project manager competence

From the answers in the interviews there was only one of the managers that actually specified that they had festival management experience prior to becoming festival manager in the festival they are in now. There was a range of educations among the respondents as well. Some were educated within economics, while others were educated within marketing. However these educations were in some way related to the theme of the festival or in relation to management. In professional competence the same pattern emerged, however not all had management experience prior to taking over the role as festival manager in the festivals discussed. There were not any mentions of personal competence, yet this was not highlighted in the questions either.

Festival	ESV	MJ	SF	TIFF	FINN	SFG	GM	BF	ØF	DNM
Festival manager competence	Norwegian School of Economics. Been with ESV since 2001. Now festival coordinator and board member	Norwegian University of Life Science. Professional musician, from TV/media, commercial industry and politics	Educated within economics	Movie clubs and had worked with the festival for 5 years before becoming festival manager	Experience in theatre science from the University in Bergen. Festival manager background. Experience from the culture industry, and several boards in culture nationally	Bachelor in international marketing from BI, and experience from digital marketing. As well as recruitment of labour before Momentium	Management, sales and marketing experience	Majored in mass communication and culture distribution from the University in Bergen	A "cand. mag" degree, history, English & political science. Experience from Platekompagniet for 14 years and the booking group at ØF	Tourism director experience. Been in tourism and events for many years

Table 12. Festival manager competence comparison



The main findings from this study show that there are not many principles from project management present and relevant to festival management. The only factors that were conclusive between the interviewees were risk management and the use and importance of experience and lessons learned among the people having been involved in the festivals for several years.

## Discussion

The research question asked in this thesis is asking if there are any common denominators in festival management that creates long running and successful festivals. The results from this study indicate there are some common factors, most dominantly and clearly is the presence of risk management in all festivals interviewed. Another factor that is present in most activities and phases within the festivals is experience and knowledge of the festivals. This knowledge comes from learning from previous years and also bases off of the experiences achieved by the festival managers and teams during the evaluation, planning and execution phases. The third factor that was present is evaluations of the festival after the festival has been executed. This learning process has shown to be important in the festivals interviewed and it was indicated that learning from both positive and negative events was essential to the festivals.

The results from this study show very clearly the two phases planning and execution, while the control phase is not as easily identifiable. Though as mentioned in several of the interviews there are control measures and actions taken, especially monitoring of activities and budgets. Which indicates this is a relevant statement, however the results from this study did not clearly identify the control processes during the festival planning and execution. This leads to H1: Successful festivals have an identifiable management cycle with planning, execution and control, being rejected.

Though this does not mean that these control measures do not exist within festival management, it might just need more specific questions in order to be able to identify the process within the festivals.

As mentioned in the paragraph above, there are certain monitoring processes mentioned in these interviews. But there are not any mechanisms for change and certainly no deviation controls indicated in the interviews. The only measures mentioned were the contingency plans and health, safety and environment plans. But these are more considered preparedness plans rather than change controls. Which in turn means H2: Good festivals have a mechanism for change based on deviation controls, is rejected.

Customer base management is a topic that is discussed in the festivals. However not all have studies or analyses on the customer base for their festival. And this can be the result of over a decade of arranging these festivals, which has resulted in a loyal audience and knowledge of the audience by the festival managers and festival teams, as experience was mentioned in a great number of the interviews. However as these festivals do not mention doing customer base studies every year they have a range of analyses and studies and evaluations during the year. This can indicate that customer base management is relevant to festivals, as the festivals that mentioned the analyses actually use them in the planning of the festival. Nonetheless the experience and knowledge of arranging the festivals have highlighted the necessity of other types of studies and analyses to be aware of financial possibilities and future strategies. However, H3: Successful festivals evaluate the economic possibilities before project start based on the customer base opportunities, is rejected.

Resource management was a topic that was mentioned in some of the interviews but not exclusively discussed. However this can be because it is a part of project

management tools or programs, or under budget controls, though this is only a speculation. Still it can be assumed these procedures are a part of the management aspect of festival management, though not clearly identified or discussed in the interviews of this study. However H4: Good festival management is where the real time resource/monetary use is checked up against the plan/budget vs. at the end of the project, is rejected. Though this area could need a bigger focus in future research.

The documentation process ranged from documenting everything to only a few selected items. From the interviews it was mentioned the importance of having documents and information available for the stage where the additional project staff start working. Especially as festival management teams are often a small number of people for most of the year and several hundred, even thousands of staff and volunteers for the festival execution weeks. However not all the festivals had a proper documentation process, though all had a version of document saving. Thus H5: Good projects document the plan, execution and deviations into an archive for future use and analysis, is partly accepted yet rejected as the process was not fully inclusive of all written documents and plans in all the festivals in this study.

As discussed previously in this study, experience and knowledge is an area that is mentioned in all of the interviews, yet also in all the areas this study is focusing on. These festivals have mentioned several times the importance of learning from each festival and from year to year. From the interviews there have been indications of using the evaluation processes and the experience in order to avoid decisions, mistakes or actions that did not were to happen in future festivals. Yet also taking advantage of good decisions and actions to make sure they are incorporated in the planning process further down the line. Also making decisions and actions during the execution phase has been indicated being either heavily relied upon only experience or a mixture of a plan

and experience in order to make the best decisions for everyone involved. Therefore is H6: Good festivals learn from what is happening and logically make assumptions, which changes the course of actions, accepted.

Risk management is one area of project management all the festivals had some kind of system for. All festivals had risk analyses based upon experience and knowledge of festivals, where the risks were identified and considered in the planning of the festivals. Safety was the biggest focus in these risk analyses, yet financial analyses were also included in some of the festivals. Consequently H7: Successful festivals have a risk management procedure in place. Where identifying, plan actions for the risk factors, execution that takes risks into consideration and control measures that consecutively assess the risks during the execution of the festival, is accepted.

Scope as mentioned is difficult to define in a festival. Especially in festivals that are changed based on who is in charge or who gets asked to define the scope or identity of the festival. Nevertheless with this experience also comes knowledge of what is necessary in order to create a festival, something all these festivals seem to have after the amount of years planning and executing festivals. Though several of the festivals were very clear on what they did not want to be a part of the scope of the festival in terms of staying true to the core of the festivals and what they wish to produce and promote. However H8: Successful festivals have a clear and thorough scope with control mechanisms that prevent slippage of the scope, is rejected.

Planning of the festival has been mentioned several times in the interviews to be critical to the success of the festivals. This was especially evident with the question of prerequisites and project template. The years of experience and knowledge of these festivals suggests that these festival management teams and expanded work and volunteer force know what is necessary to put into the plan and

execution phases. Also the importance of being well prepared and planning well has been indicated needs to happen in order to have the festival execution happen without too many surprises. Therefore H9: Defining what needs to exist, what needs to be done, and what plans to be done before the festival is planned and executed, is accepted. This is because of the experience and knowledge, even if not all the festivals have written festival templates that specify what needs to be done. An observation from the interviews is that all the knowledge within the people involved in the festival is not necessarily written down but very often used in the planning and execution of the festivals.

Project management tools were mentioned in the interviews as something most of the festivals managers had heard of. Not all used these tools. However the majority of the festivals used some kinds of tools in the process of planning and executing the festival. Though there was not necessarily a conscious decision to use tools in connection to project management. Which means H10: Good festivals will use and take advantage of project management tools where possible, is rejected.

From the interviews it showed a range of education directions and range of work experience. However from these interviews it shows it is not necessary to have a festival competence, or even management experience in order to lead a successful festival. Yet that does not mean the festival managers are not competent. In this case there was competence in other industries or management positions, or having worked with the festival for a time before being hired as festival manager/festival coordinator. Yet there were not any mentions of personal competence and skills in this study. The festival management teams in this study ranged from 2 to 14 members. However the numbers increased closer to the execution of the festival with project teams and volunteers. Though it depends on the structure and the size of the festival on how big the full year

team, project teams and volunteers are. Most of the full year teams were chosen through the normal hiring process of putting out an advertisement. This can be the basis for choosing a good team, however not all the festivals had a full team throughout the year. Thus H11: Good festivals have competent managers, and a well-designed project management team, is partly accepted, yet declined because of the lack of specifically chosen project teams.

### Proposed model for future research

Stemming from the findings in this study a model of festival success is proposed.

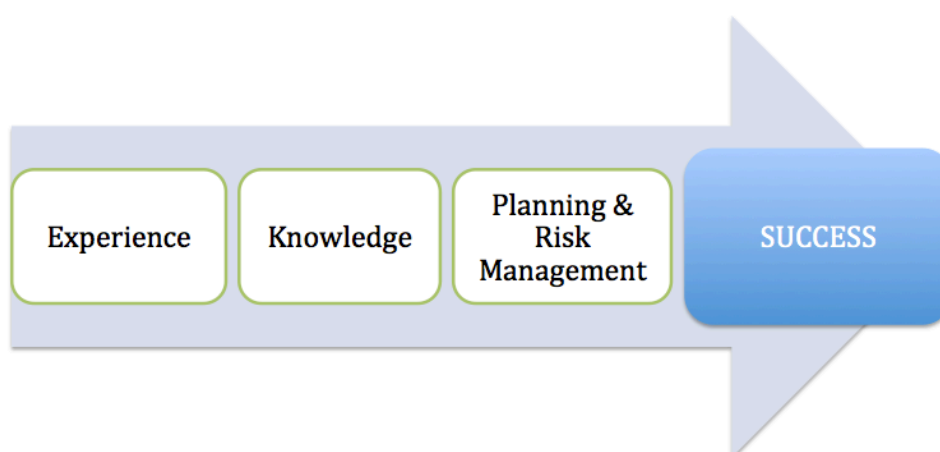


Figure 3. Proposed model for further research

The outcome of having experiences throughout the stages of festival planning and execution will provide learning foundations for festival managers and staff. After achieving these experiences and learning from them, this information will develop into knowledge of what is necessary in festival management. The combination of years of knowledge and doing good, thorough planning including risk management needs to be further studied. This is in order to see if there are any causal connections between those factors and success in festivals. This research finds the importance of having good planning that is achievable and makes the festival team prepared for what might happen

during the execution because of risk analyses done before the festival starts up. By studying this area of festival management further it could lead to more conclusive and more causal results from the findings from this study.

### **Project vs. festival management**

As discussed previously there are a few differences between project management and festival management worth mentioning. These differences are thought to be a part of the reason why most of the hypotheses above are rejected or partly accepted, while others are accepted.

Firstly as mentioned by one of the festival managers in the interview, festivals only have one week out of the year to perform and correct mistakes, while any other business have all year to do the same. This creates a different basis and importance of planning well and being able to be well prepared when the execution of the festival occurs, as well as no possibilities of moving deadlines in case it is needed. The opening day will stay the same for the festivals, in comparison to projects who can move deadlines in order to fully finish the tasks to complete the project.

Secondly, compared to companies with project portfolios festivals differ because they most often only have the one festival during the year. Which means they do not need to fight for the resources internally in the company, however there are other financial struggles such as sponsors and support from external sources. This was another topic several of the interviewees mentioned in the interviews.

Thirdly, festival management is very close to operations management rather than project management in the sense that the festivals happen every year around the same date in a continual cycle unless the festival is closed down. However, the organisations behind a festival can be a range of different organisational set ups or layouts too as

observed in this study. There can be boards, foundations, or event planning organisations at the core for strategy decisions for these festivals.

Additionally, festivals grow in size for only a few weeks out of the year around the execution of the festival. A traditional project would not grow exponentially with several hundred people over a few weeks before the final weeks of a project, which can change the dynamic of the whole project management team, and also the style of management used by the festival manager or coordinator to better guide the increased number of staff. Throughout this paper the terms festival management and project management have been used predominantly. However, within festivals it does not necessarily mean that there are more manager styles over leader styles or vice versa. The most commonly used description of managers and leaders have been that managers get people to do what they want them to, and leaders get other people to want what they have (Marker, 2010). In this study the focus has been mainly on what types of decision making and how management can be a basis for success factors in festivals. Though the two different descriptions are simple, they show a large difference between the mentality behind the ways of managing or leading a team. It can be debated that festival management is actually festival leadership, yet it is believed that there needs to be a well considered method of choosing a mixture of the two styles and the way of being in charge of a festival where the number of staff increases by several hundred in a few weeks. Though through the interviews, there were several mentions of taking care of the staff, making sure they felt seen and heard, and letting them rest after the amounts of work they go through before, during and after the execution of the festival. Which is more a leadership style of managing other people, yet this needs more focused research, which is not provided in this study.



By looking at the definition of project management “the application of knowledge, skills, tools, and techniques to project activities to meet project requirements” (PMI, 2013, p. 554), it shows that the theory is still relevant to festivals as it covers what has been discussed above and is also one of the reasons why project management theory has been chosen in accordance to festival management. Though the success factors for project management have shown to be different in “traditional” projects compared to those festivals in this study, especially in the use of project management tools or documentation. Festivals can be successful without for example having every detail in written form, or a set group of people working on the project the entire project duration. Though this can also be the same case for projects in general, as also presented in the literature review, by the range of success factors realised through decades of research.

One question that can be asked is; Why is project theory so different from festival reality?

This question is rather big and extensive, however the first point that comes to mind is the organisation structure of festivals and how that can affect the entire process of planning and eventually execute a festival. Through the interviews it was clear that even though the criteria used in choosing the festivals were the same, there were still big differences among these 10 festivals in this study. This is especially in the organisation of the festivals as mentioned. One of the examples of organisation of the discussed festivals are the ones run by foundations and hire festival management teams to produce the festivals. One was under a company that produce several other festivals and events as well as the festival discussed in this study. Another example is boards that make strategies and decision making for the festival. Because of this, it makes it evident that festivals are difficult to compare, not just in general but also to each other, particularly in ways that would lead to conclusive results and deductions.

Festivals who are arranged year after year are also different to “traditional” projects, which can also be part of the reason why festival management is not corresponding fully to the project theory in this study. Festivals like that are most often produced in a continual cycle rather than single projects at one point in time, which are finished and closed, before starting a new project. As mentioned, there will be better opportunities to use knowledge management and experiences than individual projects within a project portfolio in a project-based company. Yet this knowledge management and festival experience can be quite valuable to all kinds of management, and especially being aware and able to use it in a positive way, which can be difficult, yet these established festivals seem to have mastered the skills of transferring and using this experience and knowledge in producing successful festivals.

### **The value of experience in festivals**

This study presented 11 hypotheses from project management and success factor literature. Only 3 of those were accepted. There can be several reasons why this is the case. As mentioned above, festivals have several different aspects compared to “traditional” project management. As well as an immense collection of experience and knowledge from festival management, which is not always put into writing or researched for literature. Festivals are very good at knowledge management and using this knowledge to improve, based on the information provided by the festivals in this study. The festival industry is also dynamic and in constant change, as mentioned in several of the interviews. This means the need for developing along with the trends and industry is another important factor for festivals.

The hypotheses on the other hand are based off of success factors from a range of different projects and project management theory. This can often be focused on best

practices for projects. Benchmarking is in essence about “identifying the highest standards of excellence for products, services, or processes, and then making the improvements necessary to reach those standards” (Bhutta & Huq, 1999, p. 254), which is commonly called best practices. Benchmarking also involves comparing similar projects to find the best practices and the best ways in measuring performance (PMI, 2013). Consequently these hypotheses were created based on a more generic basis. This is something festival management is definitely not, as it is quite a specific area within events management, and especially distinct in its use of experience in producing the festivals rather than any other generic project or event.

With generic theory such as benchmarking and measurable industries it is believed that it would be more achievable in estimating possible outcomes and “the way things work” compared to a very specific and non-generic industry such as festival management. Best practice is as mentioned an aspect of benchmarking of projects or monitoring performance or quality of projects. This benchmarking method is easier to compare when the projects are similar and comparable. However with festivals it might not be as easy to compare the different festivals, possibly because they can be very different from each other as well. Nevertheless, festivals could also learn from benchmarking and best practices in learning what the competition is doing that could lead to their own performance increasing (Drew, 1997). Yet this is only possible if festivals find the most similar festivals as themselves in terms of being comparable and having relevant practices as themselves. Which could be difficult in reality.

The hypotheses in this study were also relevant to festival management, yet they were declined. A suggestion to the answer to this is that festival management is not necessarily as based on theory as project management guidelines can be, but also the fact that most of the hypotheses were partly accepted but missing certain parts for them

to be fully accepted. This shows that the theory is relevant, yet the hypotheses were rejected, and could have had a bigger focus in the interviews.

### **Weakness of the study**

This study was conducted where the researcher had little experience in interviewing, which meant there were several lessons learned throughout the process. This will be revealed further in limitations, yet a mention to the hypotheses will be relevant here. The hypotheses as mentioned above were relevant yet had a tendency to be partly accepted. There could have been several improvements to them, which were understood after the process. The hypotheses could either have been rewritten based on a better understanding of festival theory, a larger focus could have been put on the different parts of the hypotheses, the questions in the interviews could have been more focused on the different parts of the hypotheses, or the study could be redone with a series of interviews where follow up questions could be presented in additional interviews for answers that are more clear and covers the hypotheses better.

### **Strengths of the study**

However this is an exploratory study, which is meant to be a starting point in providing areas to discover further in future studies. It is believed that this has been provided in this study with several different directions and focus areas for future studies within festival management and success factors. As the main point was not in finding generalised findings, but the more specific focus of success factor within the festival management area.

### **Theoretical implications**

This study is a starting point for further research into the festival management area of success factors. As this study has several different directions to focus on for

further studies it can be a great starting point in seeing what principles did match up to hypotheses and what did not. Additionally seeing how festivals are similar to projects yet so different can create more focused research within project management studies towards festival management success factors, more than what exists today.

### **Management implications**

This study shows the value festivals have in taking care of the experience and knowledge in planning and arranging festivals year after year. Even though there are many technical and practical areas of arranging a festival, other than just experience. This is just like any other project. Though festivals are of a different nature because of the experience that is brought along through every team member and volunteer that works on the festival. Being able to take care of that experience and put it into writing for later festival teams in case key personnel leave the festival, can be valuable for festival management teams arranging festivals or are involved with a struggling festival. The same goes for the importance of risk management and good planning based on experience and risk analyses in order to be prepared for “everything”, while still being able to handle events during the execution of the festivals. Using events and experiences from the execution of festivals and learning from the good and the bad is also an important aspect to consider, and especially including an extensive evaluation phase before starting to plan the next festival.

### **Limitations and recommendations**

During the period of conducting this study there were a few limitations to consider.

A steep learning curve with the interviews and questions could have been improved by being more aware of this issue and a larger focus on the different parts of the hypotheses, but as the interviews were semi-structured the answers to the questions were mostly achieved by additional questions that were easier to understand. This is also a consideration if this study had been done at another point in time.

The interviews were also conducted in the spring, which turned out to be quite a busy time of the year for the festival managers as it is the last stretch before the intensification of staff and close to the execution of the festivals in question. This made it difficult to schedule interviews, especially Skype interviews. Even though the festivals discussed in this thesis were different in nature and range of visitors and start up years, there were some festivals missed and areas of the country not included because of the limited time to conduct interviews and analyse the answers.

Another consideration post research is that the focus of the study and interviews should have had a larger focus on success factors, rather than project management principles as there are such a large range of possible success factors available, and not always included under project management guidelines or principles.

### **Future studies**

Recommendations for future studies are a few because of the limited time frame this thesis was conducted within. The first recommendation would be to have a wider range of festivals and to conduct a quantitative study of management in a bigger number of festivals in Norway.

Another addition to this first recommendation is to have an international comparison of festivals to see whether Norwegian festivals have the same management styles as festivals in other countries.

Additionally, a comparison of successful and failed festivals would be beneficial to see if there are aspects of management successful festivals do differently than those of failed festivals. In particular festivals that were seemingly successful before going under. Lastly, a deeper study into success factors in relation to festivals could also be an area to explore as the focus in the literature tend to focus on industries like construction, defence and manufacturing, and not on events and festivals. External factors like weather, location, or the more researched topic of attendees could also be interesting factors to study, not just the internal management focus as in this study.

## Conclusion

In festivals there appears to be an abundance of knowledge and experience, rather than taking full advantage of tools and theories from project management. Festivals can be looked upon as different from “traditional” projects within other firms and therefore could explain the lack of formality and naming actions taken by the management. Experiences and knowledge appear to be transferred down to new members of the team, while at the same time using some principles from project management. Most dominantly risk management with a focus of safety, conducting evaluations of good and bad, learning from previous experiences through evaluations, and most importantly sound planning for the entire festival process. The results from this study do partly corroborate with previous research on success factors as the hypotheses were based off of previously discovered success factors. However it was discovered that festival management is similar yet quite different from project management theory in several areas, like the use of experience, the organisation of festival organisations, the similarity to operations management with a continual annual cycle, the extensive growth of project team members in the weeks before the execution,

and the fact that the execution is only a few days or one week out of the year. The three hypotheses that were accepted covered planning, knowledge of festivals and what needs to be done and learning from what is happening throughout the yearly process.

However the rest of the hypotheses that were rejected were relevant to festival management as it was to the theory, yet it also tends to be very dependent on the type of festival, size of festival and the type of management team in charge of creating the festivals, whether or not the principles from the project management theory were in use within the different festivals.

In conclusion, this study of festival management and success factors provided a good starting point into further research within the field. There needs to be more research on different success factors in festival management both internally and externally.



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## Appendices

### Appendix 1

#### Semi-structured interview questions

1. Hvor er festival lokalisert?
2. I hvilket år ble festivalen først arrangert?
3. Har den vært arrangert hvert år siden?
4. Hvor mange besøkende hadde dere ca. i gjennomsnitt det siste året?
5. Hvordan velges de nøkkelansatte?
6. Hvor mange ansatte har dere og hvilke arbeidsområder jobber de innenfor?
7. Har dere en klar oppdeling av arbeidsoppgaver mellom de ansatte?
8. Bruker dere frivillige i utførelsen av festivalen?
- 8,5. Oppfølging: Hvis så, hvor mange?
9. Har der vært mer enn 1 festival arrangør/daglig leder i løpet av årene festivalen har vært arrangert?
- 9,5. Oppfølging: Hvis så, hvor mange?
10. Hva slags kompetanse har du fra før du tok over å arrangere denne festivalen?
11. Har du noen erfaring med å bruke prosjektstyringsverktøy før du tok over ledelsen av denne festivalen?
12. Bruker dere med prosjektstyringsverktøy som en del av planleggingsprosessen? Eksempler på dette er Gantt diagrammer, arbeidsmengdestyring, og work breakdown structures.
13. Før dere begynner å planlegge årets festival bruker dere å analysere markedet og de økonomiske mulighetene?
- 13,5. Oppfølging: Hvis så, bruker dere den informasjonen til å avgjøre hvordan dere skal planlegge festivalen og økonomien?
14. Bruker dere å analysere markedet for økonomiske prospekter og kundegrunnelaget for festivalen?

14,5. Oppfølging: Hvis dere gjør det, kan analysene gjøre at dere forandrer på omfanget eller scope?

15. Hvis dere gjør analysen, avgjør denne analysen om dere vil sette opp festivalen for det neste året eller ikke?

16. Har dere en risikoanalyse før planleggingen av festivalen settes i gang?

16,5. Oppfølging: Hvordan identifiserer dere risikoer for festivalen?

16,75. Oppfølging: Hvis dere har analysen, brukes informasjonen fra denne analysen i gjennomføringen av festivalen og i planleggingen før? Kan det gjøre at dere forandrer planer for eksempel?

17. Hva må være til stede for at dere faktisk skal sette i gang med festivalplanleggingen? For eksempel et antall nummer store artister, sted for festivalen, en spesiell dato, sponsorer, osv.

18. Bruker dere erfaringer fra tidligere år til å avgjøre hva som må være en del av forutsetningene før dere avgjør om festivalen skal settes opp?

18,5. Oppfølging: Hvis noen av disse forutsetningene blir brutt kan de være med på å forandre festivalen eller planleggingen av festivalen?

19. Hvordan definerer dere temaet og omfanget av festivalen? Eller identiteten til festivalen?

19,5. Er dette noe som gjøres før dere setter i gang med planleggingen?

19,75. Er det noe som blir fokusert på under prosessen for å forhindre at temaet blir "utvannet"?

20. Hvis noe skjer i løpet av festivalen dere ikke hadde forventet som kan ha en innflytelse på utførelsen av festivalen, hva gjør dere med denne informasjonen?

20,5. Oppfølging: Hvis dere ender opp med å forandre på noe, har dere en allerede avtalt plan på hvordan dette skal foregå eller tar dere det basert på erfaring og magefølelse?

21. Hvis noe går galt eller trenger forandring i løpet av planleggingsperioden eller i løpet av festivalen, har dere en analyserespons som prøver å finne ut årsaken bak det? For eksempel lavt billettsalg.

21,5. Oppfølging: Hvis så, sjekker dere senere om de tiltakene dere setter i gang forbedrer situasjonen eller ikke?

22. Hvordan ser prosessen ut fra dere starter en festival til dere avslutter, og til starten av årets festival? Hvordan ser årshjulet deres ut?

22,5. Oppfølging. Hvilke faser har dere og hvilke faser står i hovedfokus?



23. Har dere en prosess hvor dere dokumenterer informasjon i løpet av prosjektløpet?

23,5. Oppfølging: Hvis så hvordan gjør dere dette?

24. Dokumenterer dere fremdriften i løpet av prosjektet?

25. Hvordan finner dere den informasjonen dere arkiverer?

26. Har dere en prosjekt mal basert på erfaringer? Hva som må inkluderes i planleggingen og under utførelsen, men også oppsett av planleggingen?

27. Hvorfor tror du at festivalen har vært så populær/holdt det gående år etter år?

## Appendix 2

### Quotations

#### Own opinions of longevity and success factors:

On success factors:

*"... jeg tror det handler mye om på en måte profil, altså det at man har vært veldig unik, altså sammen med festspillene i Bergen så har man på en måte unik i festivalfeltet fordi man dekker et så stort kunstnerisk område" – FINN*

On success factors:

*"... vi har vår niche liksom. Som vi ikke har noen konkurrenter på i området her. Slottsfjell og Kongsberg er liksom, de klarer seg med sitt og er en annen type festival. Så vi treffer et bredt publikum også er det utviklingen. Altså vi har, vi har, vi har jobbet hardt med utvikling. Og det omfatter jo også ganske modig finansiell satsning. I forhold til å booke dyre artister da" - SF*

On success factors:

*"Men jeg føler litt på den da, at timingen var god, og timingen de årene har vært bra. En andre suksessfaktor en ikke kommer vekk ifra er at en har plassen som utgangspunkt" – ESV*

#### Unexpected events

On using information from unexpected events analysis:

*"...og prøver å få ja å gjøre bruk av den informasjonen vi tilegner oss, klart det. Noe annet ville vært ganske meningsløst" – BF*

On unexpected events, use of information:

*"...vi har faktisk en form for løpende evaluering under festivalen når det gjelder neste års planlegging. Så mye av diskusjonen når festivalen er i gang og vi går i, i festivalarenaen er jo å se hva vi kan forbedre og justere" – DNM*

On unexpected events, use of information:

*"Ja det gjør vi jo selvfølgelig. Det vil da være dumt å ikke gjøre det" - SF*

On unexpected events:

*"Å det gjør vi jo hele veien. Vi har jo i, vi har jo planlagt for det uforutsette" - GM*

On unexpected events plan:

*"... vi har så mye erfaring at vi vet hva vi skal gjøre om noe oppstår. Vi er veldig løsningsorienterte, det er en veldig positiv gjeng som er trent opp og lært opp og er slik av natur at man kun skal se løsninger på de problemene vi har. Det er en sånn viktig egenskap vi har med i kulturen" - SFG*

On unexpected events, use of information:

*"... vi bruker veldig masse tid på evaluering av alle ledd av et arrangement. Så har alle disse med hovedansvar for sitt område legge fram det som gikk bra og det som ikke gikk så bra, og midt i mellom og alt dette her da. Også evaluerer vi: Hvorfor skjedde det og hva kan vi gjøre for å unngå at det skjer igjen. Det er kjempeviktig" - SFG*

### Documentation process

On documentation process:

*"Ja vi har, vi har et dokumenthåndteringsområde som selvfølgelig er felles. Og vi har også arkiveringsrutiner og vi har, igjen vi er så store at vi har vår egen hva skal jeg si vår egen administrasjonsledelse som ivaretar på en måte all informasjonen inn på kontoret også har vi, også har vi et felles dokumentområde som på en måte håndterer informasjonen internt" - FINN*

On documentation process:

*"Så informasjonsdeling er, det er alfa omega når du har 3 personer som jobber hele året også har du 1000 personer som jobber i en måned. Hvis de 1000 personene skal kunne gjøre jobben sin godt på en kort, begrenset periode så må de veldig effektivt få informasjon nok til å gjøre den jobben de skal og veldig effektivt kunne bidra til det systemet, den konstruksjonen som alle de 1000 personene er inni på tvers av avdelinger og sånne ting sant?" - ESV*

On documentation process:

*"Google Docs. Yes. Det er noe av et vi bruker mest. Så der legger, legges det inn med ansvarlig og status på den prosessen da. Ja. Alle arrangement og i hvert fall disse store festivalene så er det ganske store og åpne ark da. Ja så der følger vi med på alt" - SFG*

### Annual cycle and planning

On planning and adjustment:

*"... vi har faktisk en form for løpende evaluering under festivalen når det gjelder neste års planlegging. Så mye av diskusjonen når festivalen er i gang og vi går i, i festivalarenaen er jo å se hva vi kan forbedre og justere" - Den Norske Matfestivalen*

On key phases:

*"... det er ikke noe hovedprioritering mellom de, alt må til for og gjennomføres" - Ekstremsportveko*

On planning before:

*"Jeg bruker å si at evalueringen er halve planleggingen. Fordi det er i den fasen vi finner ut hva som funker og hva som ikke funket og hva slags behov vi har å endre eller legge om" - TIFF*

On planning and information sharing:

*"Og det er forskjell på en festivalorganisme og en hvilken som helst bedrift. En hvilken som helst bedrift har 365 dager å gjøre feil på og rette opp feil. Alt må stemme når vi åpner. Også kommer hele grunnlaget på 7 dager" - ESV*

On annual cycle:

*"... også begynner på en måte den planleggingsprosessen, i forhold til den går det jevnt hele året sant at den, eskalerer jo etterhvert når det begynner å nærme seg det er jo naturlig" - BF*

On annual cycle:

*"Men altså det er opprydning, hvil, evaluering, og planlegging. Hvis vi skal snakke om hovedfaser. Også kommer vi tilbake til avvikling" - TIFF*

On the annual cycle:

*"... det starter jo egentlig før festivalen med neste års sesong. I forhold til at man ser på artistmarkedet da ... det å få greie på hvem som beveger seg hvor" - SF*

### Customer base and financial possibilities

On customer base management:

*"I og med at vi har hatt den festivalen så lenge da så har vi på en måte noen basiser som er ganske sikre på hvordan det kommer til å fungere" - ESV*

On information from economic analysis to plan festival:

*"Ja viktigste styringsverktøyet vi har er resultat og utvikling fra fjoråret" - DNM*

On analysis of customer base and financial possibilities:

*"Man må jo ofte tilpasse seg ... man kan liksom ikke bare lande på noe å kjøre på den, det er en kontinuerlig prosess" - ØF*

On analysis on the market:

*"...men vi gjør jo fortløpende kan man si ganske betydelige undersøkelser av, av sponsormarkedet hvis man kan si det sånn da. Det er et viktig marked for oss internt" - FINN*

On Knutepunktsordningen:

*"Nei knutepunktordningen ble lagt ned av Stortinget i desember.... veldig betydelig endring ... i hele finansieringsstrukturen for festival Norge blir jo endret nå på grunn av det" - FINN*

### Prerequisites

On prerequisites:

*"... det er litt vanskelig å svare på for vi har ikke noe minimum, altså vi bare, vi, det blir arrangert festival uansett liksom. Det er ikke sånn som det, altså det er en del mindre festivaler som på en måte må ta stilling til det, men vi har på en måte aldri, altså det apparatet er så stort egentlig at det er, at det er ikke noe vi reflekterer rundt egentlig, om det skal arrangeres" - Øyafestivalen*

On Prerequisites:

*"Der må være en grunnleggende finansiering. Og det, det er utfordringen" - DNM*

On prerequisites:

*"For uten de sponsorene så hadde det aldri, aldri vært sommerfesten, ei heller andre festivaler" - SFG*

On prerequisites:

*"...festivalen ruller og går ... uansett om folk kommer eller ikke. Men vi må selvfølgelig gjøre noen strategiske avvenninger underveis og hvis man har et veldig dårlig år som vi for eksempel hadde i fjor, et veldig dårlig publikumsår ... så gjør man selvfølgelig analyser på bakgrunn av det og korrigerer kursen" - FINN*

### Scope creep

On scope creep:

*"Da kan vi si at sporten i det vi driver med, er det, er kjernen. Det tror jeg alle er enige om, jeg på en eller annen måte så er det kjernen ... En ting vi ikke kommer til å gjøre det er å drive med typ motorisert sport der utøvere ikke for egen motor når han gjør sporten sin. Der har vi satt et kriterium" - ESV*

On scope creep:

*"Og det er dette spleisekonseptet, spleis er et sånt ord internasjonalt ikke har hørt om, akkurat som dugnad. Og hva er det for noe? Ja. Det blir veldig sånn eksotisk da for mange. Så det er nok det viktigste bærende elementet som vi aldri kan gå bort ifra, da vil det ødelegge hele greien" - SFG*

### Risk analysis

On risk analysis:

*"Ja det er veldig mye risikoanalyse. Veldig mye sikkerhetsarbeid. Det, du har nødt til å ha det med det vi driver med ... identifisering det er jo da grupper som blir satt sammen eller personer som blir satt sammen for å, som har en veldig kjennskap til den aktiviteten. Om det er en festival eller om det er en kajaksport også må jo de identifisere, altså identifisere de risikoene i den aktuelle aktiviteten som de jobber med, og det går da inn i sikkerhetsplanen" - ESV*

On risk analysis:

*"... risiko på alt mulig som kan oppstå og kan skje... men været og publikum det er klart, det er, mye på risiko, ellers er det en fin rolig festival med lite fyll og alkohol og den typen ting, men vi bruker veldig mye på sikkerhet, vakthold og sikkerhet og sikkerhetsledelse, der har vi veldig profesjonelle folk. Det er tjenester vi kjøper eksternt da. Det er ikke folk som er*

*ansatt. Ja så de har jobbet med oss i mange år og det er veldig sånn betryggende faktor da. De kan jobben sin og vet alt fra transportlogistikk til artistsikkerhet, publikumssikkerhet, publikumsflyt” – SFG*

On risk analysis:

*”... foretok en konsekvensanalyse av det og kom fram til at vi ikke kunne gjøre det selv om det egentlig gikk litt dårlig i fjor. Vi må bare gjør det på en litt annen måte” - MJ*

On safety and financial risk:

*”... altså vi har generelt en HMS plan som er gjennomarbeidet og god og sånt. Og der, går på sikkerhetsmessige ting som selvsagt er viktig... Vi har jo et budsjett som vi forholder oss til og i det så ligger det jo en økonomisk analyse og en forventning så det er jo varierende hva man treffer hvert år” - BF*

### Project template

On project template:

*”Nei vi har ikke, vi har ikke en mal, det har vi ikke men vi har jo da et produksjonsverktøy som er digitalt, vi bruker i planleggingen av hvert enkelt prosjekt hvis vi skal ha, hvis vi kan definere de seneste produksjonene som et prosjekt” - FINN*

On festival template vs. experience:

*”... det er en kombinasjon, en mal det har vi jo ja absolutt” - BF*

On project template:

*”Nei, ja vi har en mal i Google Docs som er basert på tidligere erfaringer der absolutt alt står av arbeidsoppgaver, altså helt ned på detaljnivå da. Og det er jo litt sånn copy paste, for du bare nullstiller den og begynner på nytt igjen” - SFG*

### Arranging again

On question of arranging again the following year:

*”...vi var jo inntil nylig nå ordningen da, og at vi har vært knutepunktfestival i 20 år. Og da har man jo fast plass på statsbudsjettet og man er jo på en måte mindre sårbar for markedsmessige svingninger. Sånn at da er man jo på en måte veldig institusjonalisert i sin form da. Sånn at derfor er vi på en måte mindre sårbar for publikumssvikt og sånne ting så det er en såpass solid økonomisk form” - FINN*

On arranging the next year:

*”Det er jo en risikobrandsje og vi gjør de vurderingene som vi føler vi kan gjøre, men vi har liksom aldri vurdert å ikke arrangere festival pga blant annet dårlige tider eller sånne ting som det. Men det er jo klart det er en fortløpende vurdering, det er jo det” - BF*

On arranging again:

*”... altså det er en del mindre festivaler som på en måte må ta stilling til det, men vi har på en måte aldri, altså det apparatet er så stort egentlig at det er, at det er ikke noe vi reflekterer rundt egentlig, om det skal arrangeres” – ØF*

## Experience

On experience in staff:

*"Også får du personalutskifting også er erfaringen litt borte også, men da er det litt viktig å ha noen evalueringsnotat som ligger igjen fra årene før. Så du ser hva har man prøvd på som ikke fungerte" – DNM*

On experience:

*"... erfaringen er stor og man vet hva som skal til. For det er sånn skrekk og gru om vi må skifte ut på en del ansatte da så det håper jeg ikke skjer på ei stund da enda" – SFG*

On experience:

*"... den erfaringskunnskapen som ligger både i, i administrasjon, styret og ikke minst i frivillige apparatet her er veldig verdifullt for å kunne lage festival" - MJ*

## Scope or identity:

On identity:

*"Når du tar den delen av det, en identitet del så får du ulike svar etter hvem du spør. Sant? Og det er ikke bare publikum og sånt, men du kan spør oss som sitter i styret så får du sikkert 5 ulike svar der også. Det kommer helt an på hvem det er og hvilken bakgrunn det er sant?" - ESV*

On identity:

*"...altså det er en bred festival som samler et bredt alder spekter da. Så det er musikk for et hvert øre på en måte" - SF*

## Appendix 3

### Abbreviation of festival names

ESV: Ekstremsportveko

MJ: Moldejazz

SF: Stavernfestivalen

TIFF: Tromsø Internasjonale Filmfestival

FINN: Festspillene i Nord-Norge

SFG: Sommerfesten på Giske

GM: Gladmat

BF: Bergenfest

ØF: Øyafestivalen

DNM: Den Norske Matfestivalen