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THEORETICAL FOUNDATIONS OF FESTIVAL TOURISM RESEARCH

Mykola Pysarevskiy

Ph.D (Economics), Associate Professor
V. N. Karazin Kharkiv National University
Svobody sq., 4, Kharkiv, Ukraine, 61022
e-mail: pisarevskiy@karazin.ua
ORCID: <https://orcid.org/0000-0002-3981-5149>

Iryna Panova

Ph.D (Economics), Associate Professor
V. N. Karazin Kharkiv National University
Svobody sq., 4, Kharkiv, Ukraine, 61022
e-mail: iryna.panova@karazin.ua
ORCID: <https://orcid.org/0000-0002-1975-5644>

Mykhailo Sidorov

Ph.D (Economics), Associate Professor
V. N. Karazin Kharkiv National University
Svobody sq., 4, Kharkiv, Ukraine, 61022
e-mail: m.sidorov@karazin.ua
ORCID: <https://orcid.org/0000-0002-5911-4817>

Alina Derkach

Student
V. N. Karazin Kharkiv National University
Svobody sq., 4, Kharkiv, Ukraine, 61022
e-mail: iryna.panova@karazin.ua
ORCID: <https://orcid.org/0009-0007-5498-6935>

Contemporary trends in tourism highlight the increasing significance of event-based formats, with festival tourism emerging as a particularly dynamic and promising direction. Festival tourism involves participation in large-scale artistic, gastronomic, historical, religious, or musical events, which serve as catalysts for tourist flows, instruments for preserving cultural heritage, and tools for regional branding. In recent years, festivals have also increasingly been positioned as platforms for social dialogue, intercultural communication, and the construction of a positive image of destinations in the global arena. The subject of this study is festival tourism as a distinct form of tourist activity that combines cultural participation, social interaction, and the economic stimulation of localities. The goal of this article is to systematize theoretical approaches to the analysis of festival tourism and to identify its core classification features, structural components, and developmental trends in the context of global challenges. The objectives include: clarifying the conceptual essence of festival tourism, outlining its key functions and influencing factors, and examining international practices of its implementation. The research methodology is based on general scientific methods: systems analysis to explore the specific features of the field's development; comparative analysis to identify relevant international models; and structural analysis to elaborate a typology of festival formats. Key results include an in-depth analysis of the factors shaping demand for festival tourism, its typological features, institutional development frameworks, and emerging participatory formats. Conclusions: Festival tourism is defined as a multidimensional socio-cultural phenomenon that combines event-based experiences, the creative economy, communicative practices, and territorial identity. It demonstrates substantial potential for enhancing the tourism attractiveness of regions, fostering intercultural cooperation, building sustainable destination brands, and reinforcing local economies under conditions of global transformation.

Key words: *festival tourism, event tourism, tourist activity, cultural heritage, regional development.*

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Formulation of the problem. In the context of the transformation of tourism motivations and growing demand for authentic, emotionally engaging experiences, festival tourism has emerged as a distinct and increasingly significant segment of event tourism. This form of tourism not only satisfies recreational and cultural needs but also serves as a driver of regional development, creative industries, and social cohesion. However, the rapid evolution of festival tourism in its forms, functions, and management practices creates a demand for a systematic theoretical framework. There is a need to conceptualize festival tourism as a socio-cultural and economic phenomenon and to generalize global and local trends that influence its structure and potential. At the same time, the theoretical understanding of festival tourism remains fragmented. While numerous empirical studies exist, there is still a lack of conceptual clarity regarding its structure, classification, and socio-cultural functions. This makes it difficult to develop comprehensive approaches to its planning, management, and integration into tourism strategies at the regional and national levels.

The purpose of the article is to systematize theoretical approaches to the analysis of festival tourism and to identify its core classification features, structural components, and developmental trends in the context of global challenges.

Analysis of recent research and publications. Theoretical and applied research on festival tourism is actively developing both in international and Ukrainian academic discourse. Foundational contributions by scholars such as J. Getz, T. Andersson, and C. Mason have conceptualized festival tourism as a form of cultural consumption, a tool for regional branding, and a platform for social co-creation. Their work emphasizes the emotional, symbolic, and economic dimensions of festival experiences. In Ukraine, scholars including I. Honcharenko, I. Kuznetsova, L. Chernetska, I. Tkachenko, and I. Hrynova have studied festival tourism as a component of cultural tourism and a factor in local development. They explore its role in preserving intangible heritage, supporting local communities, and stimulating tourist flows. The academic work of M. Topornytska has contributed to defining festival tourism as a multidisciplinary phenomenon that integrates tourism, culture, art, and communication. Despite these contributions, there remains a gap in comprehensive

classifications and theoretical generalizations, especially in light of the post-COVID transformation of the tourism industry.

An overview of the research material and its main results. In the current stage of tourism industry development, where globalization intersects with the growing demand for unique cultural experiences, non-traditional forms of tourism are gaining increasing popularity. Among these, festival tourism holds a distinctive place as one of the most dynamic and vibrant segments of event tourism. It revolves around participation in or attendance at large-scale cultural, artistic, gastronomic, historical, musical, religious, or other public events.

As a distinct form of tourism activity, festival tourism has deep historical roots dating back to Antiquity. In Ancient Greece and Rome, major religious and artistic events – such as the Pythian Games, Dionysia, or the Panathenaic Games – drew thousands of participants from across regions, blending aesthetic, spiritual, and entertainment dimensions. In the Middle Ages, similar roles were played by fairs, carnivals, and pilgrimages, often accompanied by artistic performances. Thus, long before the emergence of the modern concept of “tourism,” travel for the purpose of participating in festive events was already a widespread social phenomenon.

In the 20th century, festival tourism began to take on more clearly defined institutional and commercial features. From the 1960s and 1970s onwards, Europe and North America witnessed a surge in the development of themed cultural festivals, which became tools not only for cultural expression but also for regional economic stimulation. Increased mobility, urbanization, the rise of youth culture, and the expansion of the creative industries contributed to the transformation of festivals into value-added tourism products. Since the late 1980s, scholarly discourse (e.g., Getz, 1991) has increasingly identified festival tourism as a distinct branch within event tourism, leading to its conceptualization as a form of socio-cultural activity driven by specific tourism motivations [15].

Festival tourism is grounded in motivations such as emotional engagement, creative leisure, cultural enrichment, and interaction with other participants. While traditional forms of tourism typically focus on geographic features, recreation, and relaxation,

festival tourism centers around the event itself, which serves as the “core” of the tourism product. The entire logistics, programming, communication, and marketing strategies are structured around this central experience.

According to the definition provided by the United Nations World Tourism Organization (UNWTO), event tourism – which includes festival tourism – is a form of tourism where the primary motivation is participation in planned cultural, sporting, or other time-bound events [13]. Within this broader category, festival tourism is understood as organized travel related to attending or participating in festival events with a cultural, artistic, religious, gastronomic, or historical orientation.

Ukrainian scholars I. Honcharenko and I. Kuznetsova define festival tourism as “a component of cultural tourism based on visiting events with a predominant cultural content, which are significant both for the local community and for incoming tourists” [4]. Researchers L. Chernetska, I. Tkachenko, and I. Hrynova emphasize that festival tourism not only meets recreational demands but also contributes to the preservation of cultural heritage, supports intangible cultural expressions, and stimulates regional economies. In this regard, festivals emerge as tools of local development and instruments of cultural diplomacy [5].

It is important to note that festival tourism encompasses not only major international events but also local initiatives, which often bear a deeper connection to regional authenticity [2]. As A. Hrytsyshyn highlights, it is precisely local festivals that help establish sustainable tourist routes at the level of communities and grassroots initiatives.

In academic discourse, the term “festival tourism” is also at times approached through its functional dimensions. For instance, M. Topornytska conceptualizes festival tourism not only as a form of travel but as a complex sociocultural phenomenon integrating tourism, culture, art, and communication [4].

Prominent international researchers such as J. Getz and T. Andersson view festival tourism as a powerful mechanism for social integration, identity formation within local communities, and the stimulation of tourist flows. They underscore that participation in festivals “strengthens the bond between tourists and place, creating emotional, symbolic, and repeat connections” [8]. Furthermore, they highlight the role of festivals as drivers of regional branding and sustainable destination development [10].

Similarly, British scholar Christine Mason stresses the multisensory nature of festivals, describing them as an immersive cultural experience that combines aesthetic consumption with emotional involvement. She argues that “festival tourism is not only a form of cultural consumption but also a format for social co-creation,” which enhances the relevance of such events in a globalized world [14].

Also noteworthy is the position of Australian scholar Lee Yoon, who explores festivals as a component of the creative economy. He suggests that “event tourism is a key channel for communicating the cultural narrative of regions while simultaneously transforming local spaces into global stages” [18].

Concurrently, researchers K. Robertson and M. Rogers interpret festival tourism as “a form of niche tourism where events act as the core product attracting visitors and serve as a vehicle for promoting regional culture, traditions, and creativity.”

According to Thomas Richardson, festival tourism is “a type of themed tourism that integrates cultural participation, emotional immersion, and a shared event experience,” playing a role in “reinforcing cultural diplomacy and enhancing the international attractiveness of destinations” [15].

Yanka Cheng, a scholar from The Hong Kong Polytechnic University, further emphasizes that festival tourism is “a mechanism for cross-cultural dialogue,” allowing visitors to “experience authenticity through temporary engagement in a symbolic cultural space” [17].

The academic and practical relevance of festival tourism lies in its multidisciplinary potential. In particular, I. Tkachenko identifies the key functions of festival tourism, which enable it to be understood as an effective tool for sustainable territorial development within the context of global competition among destinations (Fig. 1.1) [4].

In practice, festival tourism is closely interconnected with other forms of tourism – such as cultural, gastronomic, musical, ethnographic, and religious tourism. This multidisciplinary ensures high flexibility in developing tourism products tailored to the preferences of specific audiences [6; 13].

In today’s rapidly evolving context of tourist motivations, the analysis of the socio-economic factors influencing the choice of festival tourism has become particularly relevant. Unlike traditional tourism, which is often associated with relaxation or sightseeing, festival tourism appeals to emotional engagement, social interaction, and cultural participation [10; 15]. Therefore, the behavior of potential tourists is shaped by both objective economic parameters and subjective social determinants [3].

Contemporary academic literature highlights that a tourist’s decision to participate in festival events is driven by a combination of interrelated social and economic factors. According to research by H.B. Voronina and the generalizations provided in the monograph by M.P. Malska, the key socio-economic factors influencing festival tourism participation include: income level; educational and cultural background; age and professional profile; activity on social media platforms; the quality of local infrastructure; availability of free time; and the political and social stability of the event’s host region [4; 6].

Income level plays a particularly significant role, as attendance at festivals often entails substantial expenses – including tickets, travel, accommodation, and meals [11]. At the same time, educational and cultural background is also critical: individuals with higher education and a strong interest in art, culture, or authenticity are more likely to favor event-based tourism with intellectual or creative content [2; 17].

Age and occupation further influence preferences: young people and representatives of the creative industries tend to be the most active consumers of festival tourism, as they seek novel emotions and unconventional experiences [1; 18]. In this regard, the impact of social media and digitalization is becoming increasingly prominent. Online platforms shape public perception of festivals as prestigious and socially meaningful events, thus amplifying their appeal among target audiences [9].

Infrastructure-related conditions are no less important. The quality of transportation, accommodation, and gastronomic networks, as well as the safety and accessibility of the destination, significantly influence the tourist's final decision [12]. The amount of free time is also taken into account: short-term trips – such as weekend festival tours – are

increasingly popular due to their emotional intensity and convenient format [14].

Moreover, it is essential to emphasize that political and social stability in the country or region hosting the festival is a critical factor shaping the tourist's fundamental trust in the destination and perception of safety [7].

These factors reflect an explanatory framework aimed at gaining a deeper understanding of consumer motivation. At the same time, for the sake of systematization and clarity, it is reasonable to outline a structural model of key socio-economic factors influencing the choice of festival tourism [4; 6]. This approach enables a generalized categorization of influential variables based on their functional roles – from individual tourist characteristics to external environmental parameters (see Table 1).

The above table illustrates that the factors influencing the choice of festival tourism are heterogeneous in nature. They originate from various domains of human life and environmental conditions. For instance, economic accessibility (costs, logistics, income) constitutes a primary prerequisite for participation, while social and cultural-psychological characteristics shape the depth of involvement and the mode of event



Figure 1. Key Functions of Festival Tourism
Compiled by the author based on materials from: [4]

Table 1

Key Socio-Economic Factors Influencing the Choice of Festival Tourism

Factor Group	Specific Elements	Impact on Tourist Decision
Economic	Income level, ticket prices, transport, accommodation, meals	Determines accessibility of festival participation
Social	Age, education, professional background, availability of free time	Shapes the tourist type and preferred format of participation
Cultural-Psychological	Interest in culture, emotional motivation, desire for self-expression	Contributes to a deeper connection with the event
Media Influence	Social media, influencers, online event ratings	Affects initial selection and image of the event
Infrastructure	Quality of logistics, housing availability, services, safety	Determines overall satisfaction and practical feasibility
Political/Global	Political stability, border openness, visa policy	Influences destination choice

Compiled by the author based on materials from: [4; 6]

consumption [4; 13]. Media influence and the festival's visual environment increasingly act as standalone value components for specific social groups, particularly the youth [6; 19]. At the same time, infrastructure and safety serve as the basis for the practical realization of participation, while political conditions may act as either external barriers or, conversely, facilitators [3; 7; 12].

Following the analysis of the motivational landscape of tourists, it is appropriate to proceed with the systematization of specific types of festival tourism, which constitute the substantive core of this tourism segment. Festival tourism is complex in structure, as it encompasses events with diverse themes, scales, frequencies, geographical localization, and target audiences. As such, classification allows for a more precise identification of each type's features and enables more effective adaptation of the tourism product to the needs of specific consumer groups [1].

Academic literature offers a range of classification criteria for festival tourism, among which the most significant are: thematic focus, geographic scale, spatial localization, frequency, target audience, and motivational drivers (Table 2) [4; 15; 17].

The classification presented above highlights the multidimensionality of festival tourism, in which each type fulfills a specific role in shaping a destination's image, attracting target audiences, and stimulating tourism flows [1; 4; 13]. At the same time, many festivals are inherently multi-genre, making strict typological divisions more complex. For example, an ethnographic festival may incorporate gastronomic, musical, and educational components, transforming the event into a universal tourism platform [3; 10].

Contemporary festival tourism not only demonstrates thematic diversity, but also increasing flexibility in organizational formats and tourist engagement. Whereas events in the past typically adhered to a singular format – such as strictly music or strictly food festivals – there is now a clear trend toward hybrid formats [12; 18]. These combine multiple thematic strands, span varied spatial and temporal scales, and engage audiences through online tools and digital platforms [7; 9; 19].

It is important to note that these shifts are driven not only by the development of digital technologies but also by changing tourist demands: the contemporary consumer no longer seeks a single product but a multi-layered experience that combines entertainment, self-expression, social interaction, and engagement with the cultural life of a community [6; 14].

As a result, a new typology of festival tourism is emerging – one that complements the classical classification by introducing additional criteria such as event format, mode of engagement, interaction channels, and level of participation (Table 3). This typology does not replace the foundational one but

rather expands it, enabling a more accurate adaptation of tourism products to the conditions of the new reality [15; 20].

The contemporary transformation of festival tourism reflects a broader evolution in cultural consumption: the tourist is no longer a passive observer but an active participant, ambassador, and content creator. This has led to the increasing use of the concept “experience-based tourism”, which emphasizes authentic, personal, and emotionally resonant experiences [6; 19].

In many countries, festival tourism is regarded as an effective instrument for regional development, cultural diplomacy, and territorial branding [4; 10]. International practice shows that successful implementation of festival strategies relies not only on a unique cultural product but also on a well-structured system of support from national and local governments, private businesses, and tourism agencies [5; 12]. Such experience is particularly valuable for Ukraine in terms of introducing effective models of governance, financing, promotion, and performance monitoring in the field of festival tourism [2; 3].

According to the analysis presented in the monograph by M.P. Malska, leading countries in the development of festival tourism include the United Kingdom, Spain, Italy, France, Germany, the United States, Australia, and Japan. In most of these countries, festivals are embedded in national and municipal programs supporting culture, tourism, and the creative industries [13]. Moreover, as highlighted in a 2020 thesis, partnerships with business and media play a significant role in ensuring financial sustainability and commercial viability of events [5].

Beyond shared organizational principles, each country has developed its own model for festival tourism, shaped by historical traditions, cultural priorities, government policy, and tourism infrastructure [15; 17]. A comparative overview of selected countries with high growth in event tourism and internationally recognized festivals reveals key patterns in their development strategies (Table 4).

The case of the United Kingdom illustrates an effective combination of public support and civic management. Through Arts Council England, dozens of festivals receive annual funding, with priority given to regional events that demonstrate potential for attracting international tourists [4; 12]. Additionally, the country has established an accreditation system for events as tourism products, enabling access to supplementary grant funding.

In contrast, festivals in the United States are often organized solely by private entities, yet benefit from powerful support from the media, major corporations, and sponsors. The Coachella Valley Music and Arts Festival, for instance, generates over \$100 million annually for the local economy, illustrating the central role of branding, marketing, and the event atmosphere [10; 11].

Japan takes a different approach, focusing less on scale and more on heritage preservation and cultural integration. Many festivals, such as Gion Matsuri, boast over a thousand years of history and are recognized by UNESCO as elements of intangible cultural heritage [15; 17].

The global evolution of festival tourism in recent years demonstrates its resilience and adaptability in the face of emerging social and environmental challenges.

In the post-COVID-19 era, innovative organizational solutions have emerged that transcend traditional formats and are reshaping the very nature of the festival experience [9; 20]. These approaches can be grouped into several key vectors of transformation, as illustrated in the structural diagram (Fig. 3).

Furthermore, an important feature of international practice is the systematic institutional support for festival tourism, which is typical of most European countries. In many cases, festivals are integrated into long-term cultural and tourism strategies, regional development plans, co-financing schemes for municipal cultural initiatives, or state funds supporting the creative industries [4; 19]. For example, in France, Sweden, and the Netherlands, festivals may be officially granted the status of a “public-interest event,” allowing them to benefit from preferential financing mechanisms, discounted logistical services, or local government-supported promotional campaigns [12].

In leading countries, network-based governance structures are also widely developed. These are

Table 2

Classification of Festival Tourism by Key Criteria

Classification Criterion	Types of Festival Tourism	Examples
Thematic Focus	Music, art, theatre, ethnographic, historical, gastronomic, religious	Atlas Weekend, Tu Stan!, Cheese & Wine Festival
Geographic Scale	Local, regional, national, international	Borscht Festival (local), Leopold Jazz Fest (international)
Spatial Localization	Urban (city-based), rural (agri-festivals), cross-border	Porto Franko (urban), “Ethnofest” in Zakarpattia villages
Frequency	Annual, one-off, seasonal, off-season	Street Music Day (annual), local pop-up festivals
Target Audience	Youth, family, professional, inclusive (people with special needs)	Gamer Fest (youth), Handicraft Festivals (family)
Motivational Basis	Educational, recreational, spiritual, creative, business-oriented	Book Arsenal (educational), Sacred Music Festival (spiritual)

Compiled by the author based on materials from: [4; 15; 17]

Table 3

Contemporary Formats of Festival Tourism: Types of Transformation

Criterion	Classical Format	Contemporary Transformation	Brief Example
Engagement Channel	Offline attendance	Online / hybrid formats	Transglobal World Music Fest (online + live stage)
Spatial Scope	Local event within one location	Networked events across multiple cities	Street Music Day (20+ cities in Ukraine)
Content Structure	Single-theme (music, food, etc.)	Multi-thematic (music + culture + crafts)	Tu Stan! Festival
Temporal Format	Concentrated (1–3 days)	Extended (series of events or touring model)	GogolFest (touring across cities)
Type of Participation	Spectator / Listener	Participant / Co-creator (content co-production)	Street art or public art festivals
Digital Integration	No digital component	AR/VR tools, live streaming, interactive apps	AR Festival of Cultural Heritage in Lviv
Social Function	Entertainment or tradition	Tool for social dialogue, inclusion, and volunteerism	“Inclusion Days”, eco-festivals with civic engagement

Compiled by the author based on materials from: [15; 20]

Table 4

Distinctive Features of Festival Tourism Development in Selected Countries

Country	Key Development Features	Notable Festivals
United Kingdom	Strong role of local municipalities; public funding via the Arts Council	Glastonbury, Edinburgh Fringe
Spain	Integration of traditional and modern formats; tourism subsidies	La Tomatina, Primavera Sound
France	Alignment with national cultural policy; development of creative clusters	Festival d’Avignon, Cannes Film Festival
USA	Privately-led model; high budgets, strong corporate/media partnerships	Coachella, Burning Man
Japan	Focus on preserving intangible heritage; support via JNTO	Gion Matsuri, Nebuta Matsuri
Germany	Emphasis on music and art festivals; EU co-financing	Rock am Ring, Berlinale
Australia	Promotion of cultural diversity; collaboration with tour operators	Sydney Festival, WOMADelaide

Compiled by the author based on materials from: [11; 12]

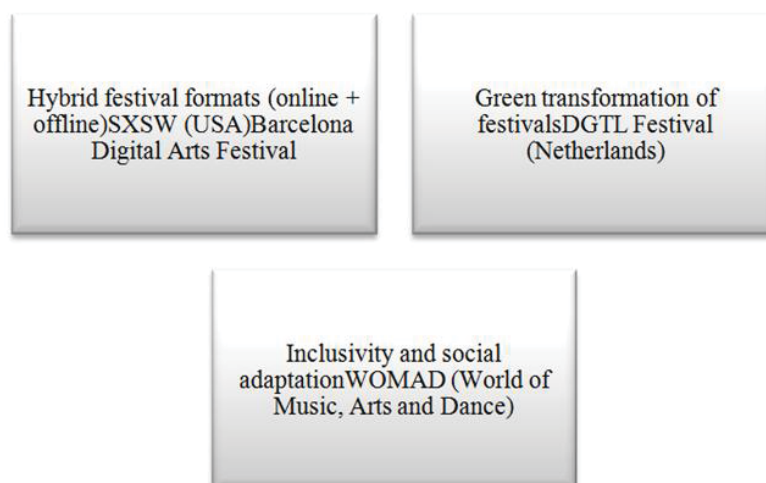


Figure 3. Contemporary Trends in the Transformation of Festival Tourism
Compiled by the author based on materials from: [9; 20]

specialized associations that coordinate festival organizers, promote festivals internationally, and facilitate professional exchange and the standardization of practices. Organizations such as the European Festivals Association, Festivals From Spain, and Live DMA play a key role in fostering communication between festivals, institutions, tourism operators, and cultural producers – ultimately enhancing the quality, consistency, and sustainability of events.

Equally important is the professional training of personnel in the field of festival tourism. The United Kingdom, Germany, and Italy offer academic and postgraduate programs in event and festival management. These programs typically include modules on project planning, event marketing, cultural policy, and the economic impact of festivals, ensuring a high level of managerial competence in the sector [5; 14].

Another critical trend in international practice is the positioning of festivals as tourism brands capable of enhancing the image of a destination. Global examples such as the Sziget Festival in Budapest or the Exit Festival in Novi Sad illustrate how a single event can evolve into a destination symbol, generating substantial tourist inflows and economic benefits [10; 11]. In today's context of intense global competition, event branding becomes as important as the branding of cities or countries themselves [13].

The growing use of digital tools in managing festival tourism is also noteworthy. These include CRM systems for audience engagement, platforms for online ticket sales, automated feedback collection, and behavioral data analytics. In countries such as the UK, Canada, and Scandinavian nations, festival platforms often collaborate with national statistics agencies to assess

event effectiveness and inform planning processes [7; 18]. Digitalization not only improves organizational efficiency but also provides transparency and robust evidence of a festival's economic and social impact.

Conclusions. Festival tourism represents a dynamic and increasingly relevant form of tourism activity that merges cultural engagement, creative expression, and socio-economic development. The present study has highlighted the multidimensional nature of festival tourism, which extends beyond thematic diversity to include flexible organizational formats, evolving digital integration, and new patterns of tourist behavior. Through a comparative analysis of international practices, it has been demonstrated that the successful development of festival tourism relies on systemic institutional support, cross-sectoral collaboration, and strategic planning. Leading countries exemplify how festivals can function not only as cultural events but as integrated tools of regional branding, economic stimulation, and cultural diplomacy. In the post-pandemic context, the emergence of hybrid formats, green transitions, inclusive practices, and data-driven management reflects the adaptability and innovation capacity of the sector. Moreover, the importance of professional education, network governance models, and digital infrastructure underlines the growing complexity of festival management. For countries such as Ukraine, which are navigating new challenges in cultural policy and tourism recovery, these insights offer valuable pathways for the development of resilient, competitive, and community-oriented festival tourism ecosystems. Further research may focus on measuring long-term socio-economic impacts, the effectiveness of branding strategies, and the role of festivals in post-crisis recovery and social cohesion.

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Писаревський Микола Ілліч, канд. екон. наук, доцент, доцент, директор ННІ «Каразінський інститут міжнародних відносин та туристичного бізнесу», Харківський національний університет імені В.Н. Каразіна, майдан Свободи, 4, Харків, Україна, 61022, e-mail: pisarevskiy@karazin.ua, ORCID: <https://orcid.org/0000-0002-3981-5149>

Панова Ірина Олексіївна, канд. екон. наук, доцент, доцент кафедри світової політики, дипломатії та туристичного бізнесу Харківський національний університет імені В.Н. Каразіна, майдан Свободи, 4, Харків, Україна, 61022, e-mail: iryna.panova@karazin.ua, ORCID: <https://orcid.org/0000-0002-1975-5644>

Сідоров Михайло Вадимович, канд. екон. наук, доцент, доцент кафедри світової політики, дипломатії та туристичного бізнесу, Харківський національний університет імені В.Н. Каразіна, майдан Свободи, 4, Харків, Україна, 61022, e-mail: m.sidorov@karazin.ua, ORCID: <https://orcid.org/0000-0002-5911-4817>

Деркач Аліна Сергіївна, студентка кафедри світової політики, дипломатії та туристичного бізнесу, Харківський національний університет імені В.Н. Каразіна, майдан Свободи, 4, Харків, Україна, 61022, e-mail: iryna.panova@karazin.ua, ORCID: <https://orcid.org/0009-0007-5498-6935>

ТЕОРЕТИЧНІ ОСНОВИ ДОСЛІДЖЕННЯ ФЕСТИВАЛЬНОГО ТУРИЗМУ

Актуальні тенденції розвитку туризму свідчать про зростання ролі подієвих форматів, зокрема фестивального туризму як потужного інструмента культурного й економічного впливу. Одним із найбільш динамічних і перспективних напрямів подієвого туризму є саме фестивальний туризм. Він передбачає участь у масових заходах мистецького, гастрономічного, історичного, релігійного або музичного характеру, які виступають каталізаторами туристичної активності, засобом збереження культурної спадщини та інструментом регіонального брендингу. Крім того, фестивальні події дедалі частіше розглядаються як платформи соціального діалогу, міжкультурної комунікації та формування позитивного іміджу територій у глобальному просторі. Предметом дослідження є фестивальний туризм як форма туристичної активності, що поєднує культурну участь, соціальну взаємодію та економічне стимулювання територій. Мета статті полягає у систематизації наукових підходів до аналізу фестивального туризму, виявлення його класифікаційних ознак, структурних характеристик та тенденцій розвитку в контексті глобальних викликів. Завдання: аналіз та уточнення змісту поняття «фестивальний туризм», окреслення його ключових функцій та впливових факторів, а також дослідження міжнародного досвіду його реалізації. Використовуються загальнонаукові методи: системний аналіз – для розкриття особливостей розвитку сфери; порівняльний аналіз – для вивчення зарубіжних практик; структурний аналіз – для розробки типології фестивальних подій. Отримано такі результати: проаналізовано чинники, що визначають вибір фестивального туризму, його типологічні ознаки, інституційні умови розвитку та трансформаційні формати участі. Висновки: фестивальний туризм є багатовимірним соціокультурним явищем, що поєднує подієвий компонент, креативну економіку, комунікативну взаємодію та територіальну ідентичність. Він має значний потенціал для розвитку туристичної привабливості регіонів, посилення міжкультурної співпраці, формування сталого бренду дестинації та зміцнення економіки в умовах глобальних змін.

Ключові слова: фестивальний туризм, подієвий туризм, туризм, туристична активність, регіональний розвиток.

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