

THE MARKET FOR MUSIC: MILLENNIALS WILLINGNESS TO PAY FOR HOSTELS

OFFERING MUSIC VENUES

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ABSTRACT

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The objective of this study is to determine market demand among 18-29 year olds for a music hostel tourism package. Furthermore, determining how each respondent fits within social worlds theory categorization lends understanding to how music communities interact. Based on a framework of Social Worlds Theory, a survey was developed to ascertain the demographics and psychographics of the target population as well as their willingness to pay for the proposed tourism package.

TABLE OF CONTENTS

Abstract.....	ii
Introduction.....	1
Literature Review.....	1
Music Tourism, Music Communities, and Social Worlds Theory.....	1
Health Benefits of Music and Serious Leisure.....	8
Millennial Music Travellers.....	9
Development and Perceptions of Hostels.....	11
Social Networking and Music.....	14
Music Performance and Venue Perceptions.....	16
Research Questions.....	18
Research Methodology.....	18
Survey Design.....	18
Study Participants.....	19
Data Collection and Analysis.....	20
Results.....	21
Descriptive Results.....	21
Social Worlds Theory Categorization for Participants.....	30
Test Results.....	32
Discussion.....	45
Implications for Hosteliers.....	45
Implications for Academia.....	46
Limitations.....	48
Further Research.....	48
Conclusion.....	49
References.....	50
Appendix A.....	56
Appendix B.....	57

INTRODUCTION

Music venues or spaces, such as pubs, stadiums, or auditoriums can help foster friendship among people and create music communities. These spaces can cultivate creativity and a shared culture among the patrons who attend the performances. While local residents certainly attend music events in their home region, “music tourism” is a thriving niche in tourism; much of the population at a given concert is likely to be tourists (Gibson, 2005). Tourists require accommodation, transportation, and nourishment as basic needs when traveling, however, the interrelationship between a tourist’s accommodation, entertainment, and community has yet to be distinguished in a music tourism setting. This study seeks to explore the parameters regarding a new business concept with tourism and leisure implications. Specifically, the purpose is to assess the market demand for hostel accommodation with an associated music venue as part of a tourism experience package. Research questions explore the psychographics, demographics, and travel behavior of millennials, born 1982-2000 (US Census Bureau, 2015), interested in a proposed music venue-hostel tourism package. Social Worlds Theory is used as a foundation to this study.

Music Tourism, Music Communities, and Social Worlds Theory

Music tourism, and to a larger degree cultural tourism, has become a major growth market for cities and governments that want to diversify their economy and expand revenue (Gibson, 2005). This niche form of tourism began with a focus on classical music but has since expanded to all genres and has many economic implications. According to Skift, a travel research and media firm, the United Kingdom (UK) generates \$3.5 billion in revenue from music tourism every year - including \$2 billion from tickets, transportation, and accommodation sales (Ali, 2013). Music

tourism, according to Gibson and Connell, “constitutes a cluster of possible tourists, activities, locations, attractions, workers, and events which utilize musical resources for tourist purposes” (2005, p. 16). These tourists are often driven by nostalgia, longing to relive a certain cultural experience or hear music that they have grown to adore (Gibson, 2005).

An early example using music to incite tourism is the use of recorded music to “take” people to far off places in the mid-20th century. This “virtual tourism” could produce the senses one might feel from being in another place even when international travel was rare and reserved for the elite, for example vinyl LPs contained orchestral works that would vividly represent places like Paris or Hawaii (Gibson, 2005). Anthropologists have argued that music can create this “sense of place” which leads people to travel further distances to experience music and other forms of culture (Campbell, 2011). Major cities helped fuel the rise of unique musical places, often defining them by music genre. Campbell (2011) recognized the direct link between willingness to travel to experience live music and the amount of improvisation in it; for example, artists that fit into the genres of jazz, blues or jam bands are some of those highly sought after by music tourists. Music has an ability to morph environments and create belonging, and in addition to other carefully chosen elements helps establish a “sense of place” for locals and tourists alike (Campbell, 2011). Lately, the first Music Tourist Summit was hosted in Glasgow, which aims to develop more strategic planning between music and tourism businesses (Musictourist.net, 2016).

The development of music tourism as a niche market is further fueled by an increase in creative tourism experiences around people, process, product, and

environment (Richards, 2011). In addition to the development of the experience economy, as noted by Pine and Gilmore (1999), tourism jobs and travelers have increased exponentially with decreases in manufacturing jobs and a focus on guest experience. Creative tourism, on the heels of cultural tourism, has diversified the tourism landscape, recognizing the interrelationship between culture and creativity and prompting increased competition among tourism providers to develop less conventional products (Richards, 2011; Stamboulis, 2003). In the Skift report, only 6% of music tourists in the UK were from out of the country but they accounted for 20% of the \$3.5 billion dollars of annual revenue linked to music tourism (Ali, 2013). Additionally, more prominent music festivals (e.g. the Reading festival in Reading, United Kingdom) bring in around \$24 million to the economy with an estimated \$160 being spent in the local economy by each of the 90,000 attendees (Vashisht, 2015). Gibson (2005) noted that backpackers “fill a particular niche of music tourists,” (p. 99). This is due to the typical genres they listen to, such as electronic dance music, and their propensity to receive information through ‘word of mouth’ local networks (Gibson, 2005). For the purpose of this study, we will define backpackers as independent travelers, often with a backpack, who utilize budget accommodations such as hostels. Markward (2011) explains how backpackers’ affinity towards local people and culture drives their travel and spending choices. What locals listen to, events they attend, and places they want to travel directly influence many backpackers (Markward, 2011). These networks are the basis by which communities share experience through cultural and music tourism.

Music tourism and the idea of in-house musicians to connect with guests has recently been embraced by international lodging conglomerate Marriott (2015). Their agreement with Universal Music Group represents a move towards bringing guest experiences on-site, which increase guest satisfaction and revenues of additional items like beverages. In addition to adding music concerts to the activities Marriott offers on property, “guests can download music from a choice of more than 5,000 songs from the Universal Music Group Catalog that they can keep on their devices permanently,” (Marriott, 2015, para. 3). The connection made with one of these offered songs may encourage further music tourism or a purchase of merchandise. Marriott Content Studio is a media service by Marriott which creates TV shows, webisodes, and short films, one of which gives guests, “a look at a city through the eyes of touring musicians” (Eng, 2016). Marriott is not the only hotel company combining lodging and music. Aloft Hotels have recently begun initiatives ranging from sponsorship of the “Live in the Vineyard” music festival in California to offering concerts with local artists in their hotel communal spaces (Carmo, 2015). Carmo (2015) found that many hotels that did not offer live music traditionally were at least offering it on special occasions to attract more millennials. Through these experiences, the guest can create a connection with music, which is mutually beneficial to the tourist, destination, and industry.

One way of viewing music tourism is through the lens of Social Worlds Theory. Affinity towards music, in and of itself, is a voluntary association (Arai and Pedlar, 2003). Voluntary associations, “provide a forum for communities of celebration that may be focused on volunteer, amateur, and hobbyist pursuits,” (Arai and Pedlar, 2003, p. 8). Music can be expressed in various forms at any given time, whether: played,

recorded, listened to, or otherwise. A musician identifies with other musicians while a 'music lover' or a fan of a specific artist may identify with people of the same mindset. Voluntary associations create environments where people can collectively engage in focal practices, which unite people through appreciation of that object (Arai and Pedlar, 2003). The ways that people express their musical 'taste' and the genres that encompass them form this appreciation, and the foundations of music communities. Jazz, Folk, and Rock as noted by Finnegan (2007) contain distinct communities, differentiated most often by their hereditary backgrounds. Shelemay (2011) ultimately defines a music community as "a social entity, an outcome of a combination of social and musical processes, rendering those who participate in making or listening to music aware of a connection among themselves" (p. 17). This definition recognizes that a music community takes a variety of factors to form, from the visual, musical, and intellectual properties of music and its cultural identity and understanding among a group of people (Shelemay, 2011). That being said, professionals and amateurs alike can be members of these communities while receiving different benefits. Friendship and being apart of a community are two benefits seen by members of Carolina Shag dance communities according to Brown, McGuire and Voelkl (2008). Stebbins (1996) found personal enrichment, fun, and self-actualization to be the most rewarding aspects of singing for Barbershop hobbyists. Award recognition, time invested, and percentage of income earned through their pursuit are aspects used to identify professionals from amateurs (Stebbins, 1996). Crossley, McAndrew, and Widdop described how jazz enthusiasts would often bond and connect over their shared admiration of jazz music at local jazz clubs (2014).

Patrons' involvement in a community and their ability to add knowledge to it may also be attributed to ones pursuit of serious leisure (Stebbins, 1982). Serious leisure is a theory articulated by Stebbins (1982) that identifies pursuits of amateur, hobbyist, or volunteer activities that are fulfilling and important to a person, so much so that they routinely participate in these activities and gain a knowledge and passion for it. Whether listening or playing music, leisure in communities of celebration, such as a concert, create shared meaning among guests (Arai and Pedlar, 2003). The necessity to persevere while partaking in a leisure activity and the possibility of career aspirations are also aspects of serious leisure. Amateur musicians and emerging acts have a particularly high need to create networks, further fueling communities. Amateurism is unique, as Stebbins (1996) points out, "it engenders in the practitioner a desire to engage in the activity beyond the time and money available for it," (p. 75). Richards (2011) prescribes that many of these amateurs or part-time workers have been "sustained by a belief in the 'one hit wonder' which will deliver riches and fame" (p. 1229). Serious leisure conceptualizes careers of involvement, as Brown, McGuire and Voelkl (2008) explain "through successive stages of beginning, development, establishment, maintenance, and decline of special skills and knowledge" (p. 3). While not all amateurs achieve fame or fortune through music, network communities increase participation and encourage growth within an individual's discipline. Open Mic Nights are a hotspot for amateur musicians to gain experience, try new pieces, and network with other musicians (Edensor, Hepburn, and Richards, 2014). Finnegan (2007, p. 281) notes that "artistic satisfaction, self-esteem, sociability, or the admiration of others," were all motivators for amateur musicians in the English town of Milton Keynes.

Complementing aspects of serious leisure, Social Worlds Theory helps explain the shared meanings experienced by the people involved in a community. These social worlds emerge when “those with shared perspectives on the phenomenon interact with one another about the phenomenon” (Ritzer, 2004 p. 768). Social Worlds Theory classifies ‘subworlds’ which help place members within the Social Worlds realm. The categories of Strangers, Tourists, Regulars, and Insiders define the ways in which members of the community interact (Ritzer, 2004). Members can be placed within the four categories based on the characteristics of orientation, experiences, relationships, and commitment (Ditton, Loomis, and Choi, 1992). Musicians and music enthusiasts come from all different backgrounds, styles, and genres, and this cultivates a learning environment of shared growth. Social Worlds Theory allows new recreation subworlds to emerge as members become more specialized within a given Social World. Early examples of social and subworlds in American music can be seen in the development of Jazz, Classical, and Barbershop music (Stebbins, 1996).

In addition to subworld segments, the concepts of commitment and involvement are also aspects of Social Worlds Theory (Ditton, Loomis and Choi, 1992). Social Worlds Theory describes the ways in which ‘actors’ interact with one another in relation to their perceived existence in a subworld. Involvement has been designated four components: voluntary involvement, partial involvement, multiple identification, and mediated interaction (Ditton, Loomis and Choi, 1992). These levels of involvement can be used to categorize the different roles Social World actors play in a given world.

Segmentation of subworlds creates more specific communities based on spatial, objects, technology, ideology, intersections, and recruitment (Ditton, Loomis and Choi,

1992). As people become more sophisticated based on these elements, more subworlds may emerge. In Jazz subworlds for example, Stebbins (1996) explains how there exists a composition of, “numerous overlapping sets of personal networks and working bands organized around full- and part-time performing opportunities of a casual or steady nature, realized in such places as bars, parks, restaurants, and concert halls,” (p. 14). Ditton, Loomis, and Choi (1992) defined a continuum from the least specialized subworld (Strangers) to the most specialized subworld (Insiders) and how recreation specialization facilitates these communities. Commitment to a particular social world and subworld, as described by Ditton, Loomis and Choi (1992), relies on consistent behavior, side bets, and an “attachment to the goals and values of a role, activity or organization” (p. 39). Beyond the social benefits that Social Worlds Theory extols, there are considerable individual health advantages to be considered by way of the enjoyment of music.

Health Benefits of Music and Serious Leisure

Music as a therapeutic source has been well researched since the publication of the book *Music and Medicine* by editors Dorothy M Schullian and Max Schoen in 1948 (Clift and Hancox, 2001). Listening to music is known to relieve stress and promote a healthy work-life balance. (Larsen, Larsen, Larsen, Im, Moursi, & Nonken, 2012). Chen, Prebensen and Huan (2008) noted how resort guests are likely to read magazines, listen to music, or watch television in addition to using spa facilities for wellness purposes. Doctors and nurses found that music can have an effect in healing and prevention, and some clinics have even gone so far as to replace televisions with spa-

type music in their waiting room (Docksai, 2011). Scholars have equally described listening and playing music as a focus of spiritual, physical, and mental health. Well-being, breathing and posture, social, spiritual, and immune system benefits were explored in Clif and Hancox's (2001) study who found that the most resounding health effects in relation to active engagement in music were positive mood, increased lung capacity and breathing, socialization, and adrenalin. In older adults, it has been noted that people with high levels of involvement in leisure see the largest health benefits (Heo, Stebbins, Kim, & Lee, 2013). For example, attending concerts, playing music, and singing in a choir were found to be factors of self-rated health in ageing adults (Nummela Sulander, Rahkonen, & Uutela, 2008). In this particular study, the authors found that women relate good self-rated health with these activities more than men, and that participative leisure activities were more closely aligned with good self-rated health. The stress relief associated with music has also been seen to reduce the likelihood of hereditary diseases becoming active, such as heart disease (Docksai, 2011). This current study focuses on members of the millennial generation and their involvement with music and music tourism.

Millennial Music Travelers

Kruger and Saayman (2015) recognize how, "music, it's lyrics and artist[s], provide models for living, making music culture an important source for the construction of (adolescent) identity" (p. 3). Millennials, also known as Generation Y, are characterized as a growing tourism market with different principles than previous generations. According to Benckendorff, Moscardo, and Pendergast (2010), millennials generally "value diversity and equality; love music, movies, television shows, friends

and dining out,” (p. 31). Millennials consist of around 75 million people and are the largest sector of the population according to Pew Research Center, a nonpartisan authority that conducts social science research (Fry, 2016). They are a generation who frequently travels, wants new experiences, wants to learn more, and are spending more on travel than Generation X (Benckendorff et al, 2010). Millennials are also three times the size of Gen X, or those born around the dates of 1960-1980, and 70% of their income is arbitrary (Dotson, Clark, & Dave, 2008; Kruger and Saayman, 2015). Dotson et al (2008) argues that the generational differences between Gen X and Gen Y come down to lifestyle choices, experiences faced growing up, and what defines a holiday.

Music, and music-based leisure - such as Band Cruises - are some of the unique experiences being marketed to Generation Y. Millennials are more likely to travel overseas, especially before having a family in their early 30’s to 40’s. Around 80% of worldwide millennials age 18 to 24 are either college educated or pursuing a degree (Edwards, 2012). These younger, educated people are traveling, visiting hostels, and seeking unique experiences. A 2020 Hotel Trends report noted that research from MMGY Global, an integrated travel marketing firm based in Kansas City, MO, indicated, “24% of millennials are planning to take more overnight leisure trips in the coming year than in the previous 12 months” (Hotel News Now, 2015, p. 3). One industry concern is the lack of repetition executed by this generation; they are unlikely to repeat business often (Benckendorff et al, 2010). This makes it necessary to create authentic and unique experiences that provide value on all fronts.

A Unique Selling Proposition (USP) helps tourism businesses differentiate themselves among an expanding field of destinations and recreation opportunities

(Benckendorff et al, 2010). It requires the development of “competitive advantage through uniqueness of the destination’s tourism resources” (p. 2). Some examples of USPs within the tourism industry include cultural tourism of indigenous people and food such as Hard Rock Café. Hostels have been founded around USPs for years, often fixated on price and location, however with increased competition, hostels must find other ways to attract new guests and sell their services. It has also been suggested utilizing USPs in marketing messages improves the recognition of products in the customer’s mind (Miller and Henthorne, 2007). Packaging lodging with experience-based products can increase market share of both lodging and other tourism businesses. Packaging is the “mixture of products, services, and interactions,” that can enhance a guest’s experience. (Kandampully, 2000, p. 14) and can most often be divided into core and peripheral services. Core services are tourism products that address the primary need of a guest while peripheral services are less expected but can increase guest satisfaction (Kandampully, 2000). These packages are part of a businesses marketing mix and ultimately help exceed guest expectations if they are developed in accordance with guest needs (Kandampully, 2000).

Development and Perception of Hostels

Once known as a “bursae”, temporary housing for students and scholars was developed by members of the Protestant and Catholic religions; indeed hostels have existed in some form since the medieval times (Edwards, 2012). However, in the 19th century, the Industrial Revolution brought more recreation facilities into urban areas and housing for the traveling public became increasingly necessary. Organizations like

the Young Men's Christian Association began to offer recreation facilities as well as lodging in London (Edwards, 2012).

The invention of the automobile at the turn of the 20th century increased the public's ability to travel further distances. Additionally, a German youth movement known as the "Wandervogel" encouraged people to participate in recreation and nature (Edwards, 2012). Around 1910, the members of the Wandervogel and the newly founded Boy Scouts and Girls Guides of the UK supported the idea of natural recreation and living off the land and are seen as predecessors of present-day backpackers (Edwards, 2012). At this time a German teacher by the name of Richard Schirrmann created the first youth hostel in his classroom as a place for students to stay during their nature excursions (Edwards, 2012). The development of youth hostels increased rapidly 1907-1913 to number over 80 and was further expanded by the establishment of Youth Hostel Associations (YHAs) in various countries (Edwards, 2012). In 1932 there were over 2,600 hostels throughout Europe. This prompted YHAs to form the International Youth Hostel Federation, which set out to establish universal guidelines and principles for YHAs (Edwards, 2012). This helped legitimize hostels as value accommodation, while tourism became a larger national and international form of leisure and revenue.

Today's youth still utilize hostels; the level of amenities offered by some hostels has become comparable with that of more luxury accommodation and therefore has raised demand for them as they have "become more in line with the accommodation experience of the mainstream tourist," (Hannam, 2007, p. 245). Poshtels, or posh hostels, are one example of the more luxurious types (Trejos, 2016). Western Europe

has been at the forefront of hostel development and participation while the United States has popularized other forms of lodging. Hostelling International (2016) notes the stark contrast of hostels in the U.S. versus worldwide. Shiv Ariyakula of HVS, a global hospitality research and professional service firm, notes the stark contrast in number of hostels in Europe versus the USA. There are over 4500 hostels in Europe, while the booking site Hostelworld.com offers 249 hostels in 98 cities in the USA (Ariyakula, 2016; HostelWorld, 2017). It should be noted that the amount of landmass in the USA compared to Europe is over 2 times. This emphasizes the popularity of hostels as lodging in other parts of the world compared to a less fortuitous movement in the U.S. (Hostelling International, 2016; Ariyakula, 2016). Hostels in the US are mainly in urban centers such as New York City or Washington DC and rarely exist outside of metropolitan areas (Edwards, 2012). Field (1999) further expressed how foreign students in the U.S. rarely visit hostels; they are more inclined to stay at hotels or with friends, while the opposite is true among travelers in Europe.

Previous research has characterized the hostel patron as young (typically 18-35), educated, and at a transition in life (Edwards, 2012). Their commonalities also persist in their necessity to conserve money, which is an understood constraint to purchasing the type of package suggested in the current study (Edwards, 2012). What may be considered 'amenity creep,' modern day hostels now provide the necessary amenities of today's travelers, "containing familiar comforts such as Wi-Fi internet, English-speaking staff, security, live music, sociality, privacy features that have become so common place and familiar within hostels, that they are now only noticeable when missing," (O'Regan, 2010, p. 12; Bertschi and Douglas, 2014). In regards to backpackers,

a subset of hostel patrons, Ooi and Laing (2010) found that of a sample of 249 18-35 year olds, 71.5% were between the ages of 18-24. Twenty-one nationalities were represented, with just over 50% being of British or Irish origin. Scandinavian countries such as Finland, Sweden, and Denmark have also been recognized as populations that travel frequently (Which countries travel, 2016).

Consumer perceptions of hostels vary. Safety, location, socializing opportunities, type of accommodations, and amenities are all integral factors for college students when choosing a hostel (Edwards, 2012). In particular, proximity to transportation, opportunity to prepare or buy food, and being able to experience the local culture are specific factors considered. Further, Amblee (2015) discovered that perceptions of hostel security were primarily based on cleanliness and location.

Social Networking and Music

Overtime, music communities have evolved around particular artists. Phish “phans”, Grateful Dead “Deadheads”, and The Beatles’ “Beatlemaniacs” are just three examples of social networking. Communities can be defined as “networks of interpersonal ties that provide sociability, support, information, a sense of belonging and social identity” (Wellman, Boase, Chen, 2002, p.153).

Deadheads are one of the most well known music fandoms around, comprising of an estimated 500,000 fans. Adams (2003) found that the average Deadhead attended Grateful Dead concerts for around 10 to 11 years, and had traveled around 800 miles to see a concert. While the band stopped touring in 1996 after the death of lead guitarist Jerry Garcia, the fandom has continued to thrive and interact. They often communicate through fan portals and on social media, rehashing their Grateful Dead experiences.

They believe that “Dead” songs help them realize an outlook on life through “kindness, peace, and awareness of the world around,” (Pattacini, 2000, p. 12). Deadheads’ resiliency through stigma and shifting music scenes is seen as the real power of the Grateful Dead.

Phish, a multi-genre jam band formed in 1983, has a following of loyal “Phans”. They originate from all over and share a “common interest and often common values,” (Mallon, 2014, p.1). Phish.net is a source of communication and affiliation that gives Phans a common representation and purpose (Mallon, 2014). Topics of freedom, ethical consumption, and authenticity were most prevalent on their messaging boards (Mallon, 2014). Phans’ common interests have lead to social and political activism, such as international aid to the 2011 Haiti Earthquake (Mallon, 2014).

Additionally, open mic communities, such as those in Manchester UK, have established a tight knit group of patrons, acts, and venue managers which help develop and maintain local music in pubs and other establishments. Open Mic Nights are one of the least intimidating entry points for amateur musicians; there are no pre-requisite skills needed and participants have the opportunity to develop their musical expression publicly. It offers a “non-exclusive, non-judgmental, liberal and supportive environment,” (Edensor, Hepburn, Richards, 2014, p. 153). Participants can achieve a variety of outcomes in the Open Mic scene, from developing stagecraft to paid performances (Edensor et al., 2014).

The use of social media has certainly affected a rapid change in the world of music as it is often shared on social media and then accessed through online album sales or peer-to-peer networks (Dewan and Ramprasad, 2014). People have broader

musical tastes today, as classified by Crossley, McAndrew, and Widdop (2014), and having a receptiveness to more genres of music is associated with “higher social status, social class, education, gender, youth, and geographical location,” (p. 9). Whiting and Williams (2013) explained that social media use for social interaction is the most prevalent form of engagement. Approximately 86% of 18-29 year olds are on Facebook (Manago and Vaughn, 2015). As a part of everyday life, “Facebook is being used to meet the basic human needs for relatedness, which involves interpersonal closeness, connection, belonging, and acceptance” (Manago and Vaughn, p. 188, 2015; also see Anderson, Fagan, Woodnutt, & Chamorro-Premuzic, 2012; Sheldon, Abad, & Hinsch, 2011). Active users of Facebook also demonstrate higher social capital than passive users (Manago and Vaughn, 2015).

Last.fm is an example of a social network platform geared towards music sharing. Baym and Ledbetter (2009) found that shared musical taste was an indicator of friendship formation on Last.fm. Proximity to a users age was also seen as an indicator for friendship on Last.fm while gender and geographic location were not (Baym and Ledbetter 2009).

Music Performance and Venue Perceptions

Music, especially in a performance setting, is a consumed experience. In addition to the musical performance itself, non-musical characteristics of the experience can be as equally important to audience satisfaction. Radbourne, Johnason, Glow, and White (2009) found that some audience members might be uncomfortable sitting in the front rows of a venue, yet they enjoyed the intimate experience and seeing the emotional reaction of performers up close. They also found that people generally wanted there to

be some audience interaction with a performance and that audiences valued communication among audience members and the feeling of being a part of a collective whole (Radbourne et al, 2009). Thompson, Graham, and Russo (2005) describe how audiences interpret emotions through visual and auditory means as opposed to just auditory means. Facial expressions and gestures of performers conveyed emotion and were distinguishable by the audience, which influenced auditory factors such as pitch and intervals (Thompson et al, 2005).

Various types of performance spaces are found globally and have been divided into four categories by British scholar Robert Kronenburg: adopted, adapted, created, and mobile (Cashman, 2013). Adopted spaces are modified for temporary use, adapted spaces are modified for permanent use, created spaces are built from scratch for permanent use, and mobile spaces are erected and demolished on an as-needed, temporary-basis (Cashman, 2013). All four types of spaces could be utilized in a lodging setting depending on need and available space. The purpose of the current study is to increase understanding of music tourism by focusing on a unique experience: the music venue-hostel tourism package.

To explore millennial interest in a combined lodging-music venue experience, a survey was developed to understand more about their willingness to purchase a proposed music venue-hostel tourism package. Their affiliation to a music community and how they define that was also investigated to give insight to their loyalty and likelihood of purchasing the product. Social Worlds Theory is used as an underlying theory to describe these affiliations, their significance, and how they affect tourism businesses.

The research question therefore is *what is the willingness of 18-29 year olds to pay for a Hostel and Music Venue tourism package?* However several 'sub-questions' were explored to understand this more fully.

1a. How do demographics such as gender, age, and origin relate to willingness to pay for the hostel experience (WTPH)?

1b. How does annual travel to music concerts and festivals relate to WTPH?

1c. How does perception of music concert atmosphere relate to WTPH?

1d. How do annual music and concert purchases relate to WTPH?

1e. How does accommodation choice relate to WTPH?

1f. How does perception of music and well being relate to WTPH?

1g. How does Social Worlds Theory categorization relate to WTPH?

Methodology

Survey design

The survey consisted of seven sections, the first establishing the demographics of the respondents. Gender, age, education level, work status, and passport availability were surveyed. The next section asked respondents about their musical involvement: how often they listen to music, play music, and their favorite genres. The next two sections inquired about the frequency of attendance to out of town music concerts or festivals. The fifth described the Music Hostel package in detail and asked the respondent how much they are willing to pay for such a package. The sixth section requested information on how much respondents annually pay for music/music subscription services, concerts, and additionally their social media posts relating to them. The final section asked respondents to indicate their level of agreement on a x-

point scale to a series of statements about musical involvement, musical commitment, their perceptions of music and wellness, and factors related to personal satisfaction at music events.

Survey questions were developed from the literature on music tourism (Ali, 2013; Campbell, 2011; Gibson, 2005), Millennial travel trends (Benckendorff et al, 2010; Dotson et al, 2008), and Social Worlds Theory (Ditton et al, 1992; Finnegan, 2007; Stebbins, 1996). The list of likert-scale agreement statements were modeled primarily after Ditton *et al.* (1992). The survey was piloted in April 2016 with eight Appalachian State University undergraduate students using an intercept method with subsequent interviews about the survey process. Revisions were made based on feedback from the pilot process and a final survey was placed online.

Study Participants

This study focuses on millennials as a target demographic for the proposed hostel music package; therefore populations in this age range were surveyed. Three nationalities were surveyed including the United Kingdom (UK), Australia, and United States of America (USA). The main concept for this thesis was developed while the primary researcher was abroad in Australia, and this country has a strong tourism business. The UK has a widespread music tourism business; therefore it is a relevant population to survey. The United States is a convenient sample to study, given that the researchers are from the USA. For the United Kingdom and Australia samples, the platform SurveyMonkey was used to purchase responses. This service is available to procure survey responses from an established pool of people who have opted-in to taking surveys for pay. This service allowed us to define the population parameters

between the ages of 18-29 and geographic regions of the UK and Australia. This encompasses a majority of millennials, as the populations would be born between 1987-1998, and millennials are identified as those born between 1982-2000 (US Census Bureau, 2015). For the United States sample we surveyed undergraduate students at Appalachian State University. These students ranged from 18-23, which is a smaller sample of the targeted demographic and should be considered a product of convenience sample.

Data Collection and Analysis

The UK dataset was collected in September 2016, the US dataset in November 2016, and the Australian dataset in January of 2017. As mentioned previously, the UK and Australian responses were purchased; therefore the remainder of this section focuses on the American sample, which was facilitated through four faculty members. Two colleges were selected for participation, the Walker College of Business and the Beaver College of Health Sciences, and within both colleges, two professors from were chosen to administer the survey. These professors were Dr. Carol Kline, PhD, Associate Professor in Hospitality & Tourism Management in the Walker College of Business, Dr. Rachel Shinnar, Professor in Management in the Walker College of Business. Dr. Joy James, PhD, Associate Professor in Recreation Management in the Beaver College of Health Sciences and Dr. Elizabeth McGrady, PhD, Associate Professor in Health Care Management in the Beaver College of Health Sciences. In each case, students were emailed the online survey link by their professor, and given a certain amount of time to complete the survey for extra credit. Each professor sent out at least one follow-up reminder email.

The United Kingdom sample was obtained through 110 paid SurveyMonkey responses from September 6th through September 7th, 2016. The Australian sample was obtained through 100 paid SurveyMonkey responses from February 7th through February 8th, 2017. A research grant was written and awarded in the amount of three hundred dollars from the Office of Student Research at Appalachian State University as well as a Barnes Program Student Research Grant from the Walker College of Business in the amount of three hundred dollars, these were utilized to obtain the Australian sample paid responses. Data were analyzed using SPSS version 24.0.

Results

Descriptive Results

From September 6th, 2016 to February 12th, 2017 three separate surveys were conducted for a total of 345. Of those, 328 were determined to be valid. Around one-third of the respondents are from each of the origin countries represented. A majority of respondents (59.5%) were female and full-time students (52.7%). Over three-fourths of the respondents had a passport (77.4%). Table 1 shows the socio-demographic breakdown of the respondents.

Table 1: Socio-demographic Profile of Participants (n=328)

Variable	Percentage of Respondents
Origin	
United States	37.8%
Britain	31.4%
Australia	30.9%
Gender	
Female	59.5%
Male	39.9%

Prefer not to answer 0.3%

Education/Work Status

Full-Time Student 52.7%
 Full-Time Work 32.0%
 Part-Time Work 21.6%
 No Work Status 7.6%
 Part-Time Student 3.4%

The educational history of the United Kingdom and Australian respondents was asked, with nearly half (47%) possessing at least a Bachelor’s degree (Table 2).

Table 2: Education History of Respondents

Education Level	Percentage of Respondents (n=204)
Secondary Education/High School	23.5%
Some College	16.2%
Associate's Degree/Apprenticeship/Trade School	6.9%
Bachelor's Degree	35.3%
Masters Degree	11.3%
Doctoral Degree	0.5%
TAFE School	5.9%

Majors of undergraduates at Appalachian State were primarily from Hospitality and Tourism (30.8%) and Recreation Management (24.6%). A total of 33 majors were represented (Table 3).

Table 3: Majors of Appalachian State Students (n=130)

Major	Percentage of Respondents
Hospitality & Tourism Management	30.8%
Recreation Management	24.6%
Business Management	7.7%
Healthcare Management	3.8%
Marketing	3.8%
Accounting	2.3%
Food Systems	2.3%
Fermentation Sciences	2.3%

Psychology	2.3%
Nutrition	1.5%
Computer Information Systems	1.5%
Other	16.9%

Respondents were asked whether they identify as a music enthusiast. Nearly all of the respondents (93.9%) identified as either a music enthusiast or somewhat an enthusiast (Table 4).

Table 4: Music Enthusiast Identification (n=328)

Music Enthusiast Self Identify?	Percentage of Respondents
Yes	67.1%
Somewhat	26.8%

Many respondents always or routinely listen to music (87.2%), while just over half of respondents play music to some extent (52.8%). Most of the respondents who play music either do it rarely or occasionally (35.4%). The detailed results of respondents music activities are in Table 5.

Table 5: Frequency of Music Activities (n=328)

Variable	Percentage of Respondents
<i>Frequency of Music Listening</i>	
Routinely	48.2%
Always	39.0%
Occasionally	7.9%
Rarely	3.4%
Never	0.9%
<i>Frequency of Music Playing</i>	
Never	47.3%
Rarely	17.7%
Occasionally	17.7%
Routinely	13.1%
Always	4.3%

Respondents were asked to select their three favorite genres of music from a list provided to them. This list was adapted from the categories found on musicgenreslist.com. Just under half of respondents (47.6%) said pop was one of their three favorite genres; this was followed by rock (39.%) and hip hop/rap (34.8%). The full list of favorite genres is available in Table 6.

Table 6: Favorite Genres of Respondents (n=328)

Favorite Genres	Percentage of Respondents
Pop	47.6%
Rock	39.6%
Hip-Hop/Rap	34.8%
Alternative	27.7%
Country	21.6%
R&B/Soul	17.7%
Singer-Songwriter/Folk	17.4%
Electronic	16.5%
Dance	15.2%
Jazz	9.1%
Religious	7.0%
Classical/Opera	6.4%
Blues	5.2%
Reggae	4.3%
Holiday	4.0%
New Age	1.8%
World Music	1.2%
Latin	0.9%

Note: As respondents could select more than one answer, percentages may not add to 100%.

The respondents were asked how many times they went to a concert in the last two years and how many of those concerts were 50 miles or more away. Around one-third of respondents (32.3%) went to only one concert in the past two years, followed by 20.7% who attended “three to four.” Half (50.8%) of the respondents traveled to concerts 50 miles or further away, with 16.3% going to one or two concerts, respectively. More detailed results are outlined in Table 7.

Table 7: Concert Attendance Habits (n=328)

Variable	Percentage of Respondents
<i>Amount of Concerts Attended in Last 2 years</i>	
Less than one	17.7%
Once	32.3%
Three to Four times	20.7%
More than four times	15.2%
<i>Amount of Concerts Attended Over 50 Miles Away, last 2 years</i>	
1	16.3%
2	16.3%
3	4.7%
4	4.4%
5	4.1%
6+	5.0%

The accommodation use of concert travelers was diverse. About half of the population stayed at Hotels, Resorts, or Motels (26.2%) or with Friends or Relatives (25.6%). Hostels, the main focus of this study, were stayed at by 5.5% of the respondents. Table 8 details the complete accommodation choices by concertgoers.

Table 8: Accommodation Use at Concerts (n=328)

Accommodation Used	Percentage of Respondents
Hotel/Resort/Motel	26.2%
Friends or Relatives	25.6%
I typically don't stay overnight	24.4%
Hostels/Backpackers	5.5%
AirBnB, Couchsurfing, Etc.	5.2%
Camping	3.0%

The respondents were asked how many times they went to a festival in the last two years and how many of those concerts were 50 miles or more away. Approximately one-third of the respondents (33.2%) went to at least one festival in the last 2 years

with 29.2% having gone to festivals further than 50 miles. Table 9 describes the populations festival attendance habits.

Table 9: Festival Attendance Habits (n=328)

Variable	Percentage of Respondents
<i>Amount of Festivals Attended in Last 2 years</i>	
Less than one	25.3%
Once	25.0%
Three to Four times	7.0%
More than four times	1.2%
<i>Amount of Festivals Attended in Last 2 years over 50 Miles Away</i>	
1	13.4%
2	8.5%
3	2.1%
4	2.4%
5+	2.7%

Accommodation use of festivalgoers was similar to concerts. Of those that went to festivals, around one-fifth (18.3%) don't stay overnight, while most people (26.5%) once again stayed at Hotels, Resorts, or Motels or with Friends or Relatives. Hostels, the main focus of this study, were utilized by 6.1% of the respondents. Table 10 shows the breakdown of accommodation use of festival attendees.

Table 10: Accommodation Use At Festivals (n=328)

Accommodation Used	Percentage of Respondents
Hotel/Resort/Motel	13.4%
Friends or Relatives	13.1%
I typically don't stay overnight	18.3%
Camping	8.5%
Hostels	6.1%
AirBnB, Couchsurfing, Etc.	4.9%

Spending varied on music activities in the last year. Many respondents indicated they utilize one streaming service for all of their music, either listing that service by name or listing their monthly expense for that service. These numbers are represented

in USD, and all Pounds and Australian Dollars have been converted. Just over one-third of respondents (37.6%) spent less than 50 dollars last year on music downloads or streaming. Around a fifth (21.3%) spent between \$51 and \$100 dollars. Most respondents (53.4%) spent less than \$200 on concert tickets in the last year with an additional 21.1% spending over \$200. Table 11 depicts the full range of spending on music activities.

Table 11: Dollars Spent On Music Activities (n=328)

Variable	Percentage of Respondents
<i>Dollars Spent on Music Downloads</i>	
1 to 50	37.6%
51 to 100	21.3%
101 to 200	16.4%
201 to 300	1.8%
301+	2.5%
<i>Dollars Spent on Concert Tickets</i>	
1 to 50	18.8%
51 to 100	21.6%
100 to 200	16.1%
201 to 300	8.3%
301+	10.5%

Respondents social media use to talk about music was questioned. Most respondents post about listening to music (61.0%) or attending a concert or festival (62.8%) at least a few times a year. Almost half of respondents (48.5%) post about attending concerts or festivals a few times a year. More respondents post daily about listening to music (13.5%) than do so around once a week (11.0%). Table 12 shows the frequency of social media use by respondents.

Table 12: Social Media Use of Respondents in Regards to Music Activities

Variable	A few	Once a	Once a	Daily
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	times a year	month	week	
Listening to Music (n=327)	23.6%	12.9%	11.0%	13.5%
Playing Music (n=326)	18.0%	7.0%	6.1%	2.1%
Performing, producing, recording, or editing music (n=325)	8.9%	4.9%	4.3%	3.4%
Attending a concert or festival (n=328)	48.5%	8.2%	4.3%	1.8%

Respondents were asked a variety of questions related to their concert experience. These were evaluated on an agreement scale. Around four-fifths of respondents agreed or strongly agreed that a concert could be enjoyable if they had never heard of the artists (78.8%), did not meet the artists (87.7%), were not at the front of the crowd (84.6%), or did not buy band merchandise (86.1%). Around two-fifths agreed or strongly agreed that the atmosphere of a concert is important to them (40.5%). There was no general consensus on how many artists respondents preferred to hear, as 48.5% neither agreed nor disagreed. Most respondents (85.2%) agreed that music benefits their well being. The full details of respondents concert preferences are shown in Table 13.

Respondents preferences to choose music activities over other recreational activities provided mixed results. Around two-fifths of respondents would rather listen to music (38.9%) or go to a concert or festival (41.4%) over other passive recreational activities, while 22.8% would choose to play music over other active activities. Table 14 offers additional details on respondent activity preferences.

Table 13: Concert Environment and Motivations (n=324)

Variable	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
A concert can be enjoyable even if I've never heard of the artists	4.6%	4.0%	12.7%	51.9%	26.9%
A concert can be enjoyable even if I don't meet the artists	1.5%	2.8%	8.0%	28.1%	59.6%
A concert can be enjoyable even if I am not at the front of the crowd	1.5%	2.5%	11.4%	45.1%	39.5%
A concert can be enjoyable even if I don't buy band merchandise	1.5%	2.2%	10.2%	31.5%	54.6%
I go to music concerts in order to learn about the music	8.0%	22.8%	39.5%	22.2%	7.4%
I go to music concerts in order to network with musicians	28.7%	36.4%	23.1%	8.6%	3.1%
An intimate atmosphere of a concert is important to me	4.0%	16.0%	39.5%	30.9%	9.6%
I prefer to attend a concert featuring 3 artists/bands or less	3.1%	15.7%	48.5%	25.6%	7.1%
When I travel I am interested in seeing a band that identifies as part of the local culture	7.1%	17.0%	42.0%	27.2%	6.8%
I believe that listening to music benefits my well being.	1.5%	1.9%	11.4%	42.0%	43.2%

Table 14: Music Activity Choices (n=324)

Variable	SD	D	Neither	A	SA
I would prefer to listen to music over other passive recreational activities	4.9%	20.4%	35.8%	27.8%	11.1%
I would prefer to attend a music concert or festival over other passive recreational activities	7.1%	20.1%	31.5%	28.1%	13.3%
I would prefer to play music (instruments) or sing over other active recreational activities	18.8%	31.5%	26.9%	15.7%	7.1%

Note: SD=Strongly disagree; D=disagree, Neither =Neither agree or disagree, A=agree, SA=strongly agree

Social Worlds Theory Categorization for Participants

Orientation

Membership in a social world is based on the extent to which a person understands and identifies with that social world (see Table 15 for summary of concepts). For the purpose of this study, the degree by which a person identifies as a music enthusiast is used as a determination of orientation (see Table 6). Respondents who did not consider themselves music enthusiasts are typically considered strangers, while one's who identify as music enthusiasts fall under the latter three categories.

Experiences

Experience relates to an individual's understanding of rules, procedures, and norms of a social world. This can transition from learning these norms to eventually creating social world experiences. In this study, respondent's frequency to go to music concerts and festivals is considered learning the rules and procedures of music social worlds (see Table 7 & Table 9, section 2). Strangers are people who infrequently go to concerts but have some interest in them. Tourists understand the norms of concerts but do not go to them regularly as part of social worlds. Regulars are people who go to concerts frequently, while Insiders are people who go to concerts and festivals and may also participate in them.

Relationships

In relation to this study, the frequency of social media postings of any music activities is used to determine a respondent's level of relationship to music social worlds (see Table 12). Strangers and Tourists are respondents who almost never post or post infrequently on social media about music activities, while Regulars and Insiders

will post more frequently about subjects such as listening to music, playing music, or attending a concert or festival.

Commitment

The continuation of a social world is largely based on the commitment of its actors. Commitment is seen as consistent, focused behavior, as well as the introduction of side bets, and an attachment to goals and values of a role, activity, or organization (Ditton, Loomis, and Choi, 1992). Commitment in this study is gauged by a respondent’s frequency to listen to and play music (see Table 5). Strangers and Tourists are respondents who may listen to music frequently, but most likely not play music to any great extent. Regulars and Insiders are people who are committed to the social world through consistently listening to music and may also play frequently. The consistency and frequency of participating in these music activities is the defining characteristic of commitment.

These six factors based on Orientation, Experiences, Relationships, and Commitment were used in creating the Social Worlds Theory categorization of respondents, as shown in Table 29.

Table 15: Characteristics and Types of Participation in Social Worlds

	<i>Strangers</i>	<i>Tourists</i>	<i>Regulars</i>	<i>Insiders</i>
<i>Orientation</i>	Naiveté	Curiosity	Habituation	Identity
<i>Experiences</i>	Disorientation	Orientation	Integration	Creation
<i>Relationships</i>	Superficiality	Transiency	Familiarity	Intimacy
<i>Commitment</i>	Detachment	Entertainment	Attachment	Recruitment

Source: Unruh (1979)

Test Results

To address the overarching research question regarding *willingness of 18-29 year olds to pay for a Hostel and Music Venue tourism package*, several 'sub-questions' were explored. For example, to investigate how demographics relate to WTPH, three statistical analyses were employed.

Gender

In order to test the relationship between gender and WTPH, an independent samples t-test was conducted. The test was found to be statistically significant, $t(313) = -2.41, p < .05$. These results indicate that females ($M = 3.81, SD = 1.11$) would pay more than males ($M = 3.47, SD = 1.36$) for the hostel experience.

Women would pay around \$7 dollars more than men for the same experience; perhaps one main reason for this is the questionnaire wording which specifically listed a hostel offering women only dorms as well as mixed dorms and private rooms. Based on this result, a hostel owner may wish to charge more for a single gender rooms compared to mixed dorms – especially if a private bathroom were included.

Age

To test the relationship between ages of respondents and WTPH, a one-way Analysis of Variances (ANOVA) test was conducted. The ages of respondents, which ranged from 18 to 29, were grouped into categories to keep the group sizes fairly even. Because the largest part of the sample were students enrolled in university, there are more respondents in younger categories. The means and standard deviations of the age categories are displayed in Table 16.

Table 16: Means & standard deviations of ages in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
18-20 (n=96)	3.7	1.22
21-23 (n=93)	3.66	1.22
24-26 (n=67)	3.39	1.36
27-29 (n=60)	4.02	1.02

A Levene's test for equality of variances was found to be significant $F(3, 312) = 4.88, p = .002$, indicating equal variances not assumed, therefore, a Welch test of equality of means was conducted, producing a statistically significant result $F(3, 163) = 3.11, p < .05$.

Post hoc comparisons using the Games-Howell test indicated that the mean score for the respondents in the 27-29 age range ($M = 4.02, SD = 1.02$) was significantly different than the 24-26 ($M = 3.39, SD = 1.36$). However, no statistical significance was found between respondents in the 18-20 age group ($M = 3.70, SD = 1.22$) and the 21-23 age group ($M = 3.66, SD = 1.22$).

The oldest age range, 27-29 year olds, would pay the most for the hostel experience, which could be indicative of this group having stable employment. 18-20 year olds as well as 21-23 year olds would pay around the same for the experience; 24-26 year olds would pay the least. This is an important factor in considering which millennials to market to, and the price sensitivity among the age groups.

Respondent Origin

An ANOVA test was conducted to determine the relationship between respondent origin and WTPH, however the Levene's test was found to be violated $F(2, 314) = 1.89, p = .15$. A Welch test for equality of means was used and showed that there was not a significant effect of origin on willingness to pay $F(2, 314) = 2.95, p = .054$. However, this would be considered statistically significant at the $p < 0.10$ level. The means and standard deviations of each country of origin are observed in Table 17.

Table 17: Means and standard deviations of origin in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
UK (n=99)	3.43	1.31
Australia (n=95)	3.82	1.18
USA (n=123)	3.76	1.17

While these results were not statistically significant, it is important to note how Australia and United States respondents were willing to pay more as opposed to the United Kingdom. There are more hostels per capita in the United Kingdom and Australia, while the USA has very few hostels except in major cities. Australian and American respondents are likely to pay around \$8 dollars more for the experience than United Kingdom respondents.

Spending on Concerts

Research question 1b related to the relationship of WTPH with respondents' annual purchases on music and on concerts; the British and Australian responses from these survey questions were converted to US dollars. An ANOVA test was conducted to determine the relationship between respondents annual dollars spent on concert tickets and WTPH, however the Levene's test revealed unequal variances $F(5, 311) =$

6.05, $p = .00$. Therefore, the results from a Welch test were employed. These results indicate a statistical significance $F(5, 123) = 5.57, p < .05$.

Post hoc comparisons using the Games-Howell test indicated that the mean score for the \$301+ category ($M = 4.25, SD = 1.08$) was significantly different than the \$1-50 category ($M = 3.48, SD = 1.13$) and the \$0 category ($M = 3.15, SD = 1.48$).

However, the \$51-100 category ($M = 3.81, SD = 0.96$), the \$101-200 category ($M = 3.98, SD = 1.07$), and the \$201-300 category ($M = 4.00, SD = 1.02$) did not significantly differ from the \$301+ category (Table 18).

Respondent Concert Attendance

An ANOVA test was conducted to determine the relationship between visits to concerts further than 50 miles away in the past 2 years and WTPH. The Levene's test for equality of variances was found to be significant $F(4, 303) = 7.94, p = .00$, therefore, a Welch test of equality of means was used. The results were statistically significant $F(4, 98) = 10.92, p < .05$. Post hoc comparisons using the Games-Howell test indicated that the mean score for the respondents who went to four or more concerts ($M = 4.38, SD = .62$) was significantly different than ones who went to 0 concerts ($M = 3.34, SD = 1.35$) and also between 0 concerts, 1 concert ($M = 3.96, SD = 1.01$) and 2 concerts ($M = 4.00, SD = 1.02$). However, between 2 concerts and 3 concerts ($M = 3.89, SD = .99$) there was no statistical significance from the 0, 1 and 4+ category (Table 20).

Table 20: Means & standard deviations of concert visits in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
0 (n=154)	3.34	1.35
1 (n=48)	3.96	1.01
2 (n=49)	4.00	1.02

3-4 times (n=28)	3.89	0.99
More than 4 (n=29)	4.38	0.62

The number of concerts a person attends more than 50 miles away from home is important in how much he/she is willing to pay for the hostel experience. However, most respondents who went to at least one concert were willing to spend within the \$60 dollar range, while those who didn't go to concerts would pay around \$47 dollars. There was a large jump from people who went to 3-4 concerts and people who went to more than four, with those respondents willing to pay \$68 dollars for the experience. This suggests that frequent concertgoers, especially ones who go more than four times a year, are going to pay more for a music hostel experience.

Respondent Festival Attendance

An ANOVA test was conducted to determine the relationship between visits to festivals further than 50 miles away in the past 2 years and WTPH. A Levene's test for equality of variances was found to be significant $F(3, 285) = 10.88, p = .00$, therefore, a Welch test was used. These results indicate that there was statistical significance $F(3, 65) = 11.40, p < .05$. Post hoc comparisons using the Games-Howell test indicated that the mean score for the respondents who went to three or more festivals ($M = 4.33, SD = .76$) was significantly different than ones who went to 0 ($M = 3.46, SD = 1.31$) or 1 festival ($M = 4.17, SD = .77$). However, no statistical significance was found between respondents who went to two festivals ($M = 4.04, SD = .92$) from respondents who went to 0, 1 and 3 or more (Table 21).

Table 21: Means and standard deviations of festival visits in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
0 (n=198)	3.46	1.31
1 (n=41)	4.17	0.77
2 (n=26)	4.04	0.92
3+ (n=24)	4.33	0.76

Festival attendance was found to correlate with a respondent’s likelihood to pay more for the hostel experience. Those respondents who did not attend a festival further than 50 miles away in the last two years were only willing to pay \$50 dollars, while those who went to at least one festival were willing to pay between \$60-67 dollars for the same experience.

Perceptions of Music Venue Atmosphere

To investigate research question 1c, *How does perception of music concert atmosphere relate to WTPH?*, an ANOVA test was conducted to test the relationship between perceptions on intimate atmosphere and WTPH. The survey question, as shown in Appendix B, has five options of agreement. These have been condensed to Agree, Neither Agree or Disagree, or Disagree.

The Levene’s test was found to be violated $F(2, 310) = .82, p = .44$, therefore ANOVA is an appropriate test. No statistically significant difference was found between importance of intimate atmosphere and WTPH $F(2, 310) = .385, p = .681$ (Table 24).

Table 24: Means & standard deviations of atmosphere in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Disagree (n=62)	3.6	1.36
Neither Agree or Disagree (n=124)	3.63	1.19
Agree (n=127)	3.74	1.2

Respondents who valued an intimate atmosphere were only willing to pay a fraction more than ones who did not, therefore it would suggest that stating an intimate atmosphere for marketing purposes would not affect the price one would pay for the hostel experience.

Spending on Concert Tickets

Table 18: Means & standard deviations of concert spend in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
\$0 (n=82)	3.15	1.48
\$1-50 (n=50)	3.48	1.13
\$51-100 (n=72)	3.81	0.96
\$101-200 (n=47)	3.98	1.07
\$201-300 (n=30)	4.00	1.02
\$301+ (n=36)	4.25	1.08

Based on the respondents’ history of purchasing concert tickets, it is evident that those who spent more on concerts annually were willing to pay more for the hostel experience. The range begins at around \$43 dollars for respondents did not spend anything on concerts in the past year to \$65 dollars for respondents who spent more than \$301 dollars on concerts. This signifies that hostels offering this type of experience should look to high spending concertgoers for additional revenues.

Spending on Music Downloads/Streaming

An ANOVA test was used to test the relationship between respondents annual dollars spent on music downloads and streaming and WTPH. A Levene’s test for equality of variances was found to be significant $F(5, 311) = 2.61, p = .00$. Therefore, a Welch test of equality of means was conducted. There was not a significant effect between annual dollars spent on music downloads on Willingness to Pay $F(5, 40) = 1.981, p = .10$ (Table 19).

Table 19: Means and standard deviations of annual dollars spent on music downloads in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
\$0 (n=68)	3.46	1.35
\$1-50 (n=108)	3.52	1.27
\$51-100 (n=72)	3.94	1.1
\$101-200 (n=52)	3.83	1.06
\$201-300 (n=7)	4.14	0.9
\$301+ (n=10)	3.9	1.29

As opposed to annual expenditures on concerts, respondents who purchased music downloads or streaming services were less likely to pay more for the experience. While these results varied, once someone spent more than \$51 dollars on music downloads there were willing to pay around \$8 dollars more for the experience compared to those who spent less than \$51. For hostel owners, it may be important to advertise to people who traditionally use music services and who are dedicated to them. An annual Spotify membership in the USA is \$120 dollars a year and for students is \$60; Apple music is also \$120 dollars a year.

Accommodation Choice at Concerts

An ANOVA test was conducted to determine the relationship between accommodation choice at concerts and WTPH. The Levene’s test for equality of variances was found to be significant $F(5, 283) = 2.25, p = .049$, therefore, a Welch test was employed. There was not a significant effect between accommodation choice at concerts on WTPH: $F(5, 50) = 2.022, p = .09$ (Table 22).

Table 22: Means & standard deviations of concert accommodation choice in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Hotel (n=89)	3.7	1.14
Friends, Family (n=84)	3.98	1.11
AirBnB, Couchsurfing (n=17)	3.41	1.46
Hostels (n=18)	3.72	1.23
Camping (n=10)	3.5	1.3
No Overnight (n=71)	3.38	1.22

Accommodation choice of respondents at concerts more than 50 miles away from home varied. All respondents who stayed overnight were willing to pay upwards of \$48 dollars for the experience. Most respondents stayed at either Hotels, with Friends or Family, or did not stay overnight. People who stayed with friends and family were willing to pay the most for the experience, around \$60 dollars. While those who stayed at Hostels and Hotels were willing to pay a similar \$56 dollars.

Accommodation Choice at Festivals

An ANOVA test was ran to determine the relationship between accommodation choice at festivals and WTPH. A Levene’s test for equality of variances was found to be significant $F(5, 208) = 2.36, p = .041$. Therefore, a Welch test of equality of means was conducted. There was no statistical significance found between accommodation choice at festivals on WTPH $F(5, 74) = 1.32, p = .27$ (Table 23).

Table 23: Means & standard deviations of festival accommodation choice in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Hotel (n=45)	3.72	1.03
Friends, Family (n=43)	3.67	1.21
AirBnB, Couchsurfing (n=16)	3.94	1.12
Hostels (n=21)	4.24	0.94
Camping (n=28)	3.93	1.1

No Overnight (n=60)	3.63	1.38
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Respondents who stayed overnight at festivals were generally willing to pay more than concert attendees for the hostel experience. Festivalgoers who stayed in hostels were willing to pay \$65 dollars, which was high compared to the other accommodation choices. In general, festivals are a larger time and financial commitment, which may help justify the higher willingness to pay for the experience. That being said, if hostels choose to offer a longer-term series of weekend concerts, they may be able to charge a higher price or an all-inclusive price for the whole series.

Perceptions on Wellness

Research question 1f related to the belief in music as a means to wellness and the respondents' WTPH. The Levene's test for equality of variances was found to be significant $F(2, 310) = 3.99, p = .020$, therefore, a Welch test of equality of means was conducted, which showed a statistical significance $F(2, 22) = 7.28, p < .05$. Post hoc comparisons using the Games-Howell test indicated that the mean score for the respondents who agreed that music benefited their well being ($M = 3.78, SD = 1.14$) was significantly different than ones who went to neither agreed or disagreed ($M = 3.27, SD = 1.37$) or disagreed ($M = 2.18, SD = 1.60$) (Table 25).

Table 25: Means & standard deviations of wellness in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Disagree (n=11)	2.18	1.6
Neither Agree or Disagree (n=37)	3.27	1.37
Agree (n=265)	3.78	1.14

Over 85% of respondents agreed that music benefitted their well being, and the range between people who did not believe this versus people who did was vast. Those who believed it did benefit their well-being were willing to pay around \$56 dollars for the hostel experience, suggesting that incorporating wellness into marketing would help increase the price and encourage visitors.

Preferences on Playing Music over Active Activities

An ANOVA test was used to determine the relationship between respondents preferences to play music over other active recreational activities and WTPH. Levene’s test for equality of variances was found to be violated $F(2, 310) = 1.00, p = .37$. These results reveal that there was not a significant effect of playing music over active recreational activities on WTPH $F(2, 310) = .006, p = .99$ (Table 26).

Table 26: Means & standard deviations of play over active in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Disagree (n=156)	3.67	1.21
Neither Agree or Disagree (n=85)	3.66	1.32
Agree (n=72)	3.68	1.16

Preferences on Listening to Music over Passive Activities

In order to test the relationship between listening to music over passive recreational activities to pay for the hostel experience, a one-way ANOVA test was conducted. A Levene’s test for equality of variances was found to be significant $F(2, 310) = 11.88, p = .000$. Therefore, a Welch test of equality of means was conducted, which showed statistical significance $F(2, 179) = 3.37, p < .05$. Post hoc comparisons using the Games-Howell test indicated that the mean score for the respondents who

preferred to listen to music over other recreational activities ($M = 3.88, SD = .99$) was significantly different than ones who did not prefer to listen to music over other passive activities ($M = 3.44 SD = 1.45$). However, between respondents who did not prefer and ones who were indifferent ($M = 3.61, SD = 1.26$) there was no statistical significance. (Table 27)

Table 27: Means & standard deviations of listen over passive in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Disagree (n=81)	3.44	1.45
Neither Agree or Disagree (n=112)	3.61	1.26
Agree (n=120)	3.88	1.23

Preferences on Attending Concerts over Passive Activities

In order to test the relationship between preferences to attend a music concert over passive recreational activities and WTPH, a one-way ANOVA test was conducted. These results are observed in table 27. A Levene’s test for equality of variances was found to be significant $F(2, 310) = 10.10, p = .000$. Therefore, a Welch test of equality of means was conducted. These results demonstrated a statistical significance $F(2, 179) = 2.94, p < .05$. Post hoc comparisons using the Games-Howell test showed that the mean score for the respondents who preferred to attend a music concert over other recreational activities ($M = 3.85, SD = .1.03$) was higher than ones who did not prefer to attend a concert over other passive activities ($M = 3.44 SD = 1.45$). However, between respondents who did not prefer and ones who were indifferent ($M = 3.62, SD = 1.22$) there was no statistical significance (Table 28).

Table 28: Means & standard deviations of attend over passive in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Disagree (n=86)	3.44	1.45
Neither Agree or Disagree (n=98)	3.62	1.22
Agree (n=129)	3.85	1.03

While neither three of these variables were statistically significant, it is important to note that respondents who were likely to attend concerts or listen to music over passive recreational activities were willing to pay more than those who did not. These psychographic questions suggest that most people would be willing to pay around the same for the tourism package no matter their preferences on music activities. With pretty even groupings, it is evident that many respondents prefer concerts or listening to music over activities, while the opposite seems to be true for playing music, suggesting a smaller base of musicians in the respondent sample.

Social Worlds Theory

Respondents were divided into Strangers, Tourists, Regulars, and Insiders based on their responses to six questions in the survey. The method used to divide them was based on natural breaks of near equal sample sizes, similar to the method employed by Ditton et al (1992). ANOVA was used to test the relationship between a respondent's Social Worlds Theory categorization and their WTPH. The means and standard deviations of each category are observed in table 28. A Levene's test for equality of variances was found to be significant $F(3, 313) = 3.148, p = .03$. Therefore, a Welch test of equality of means was conducted; the results show that there was statistical significance $F(3, 71) = 4.50, p < .05$. Post hoc comparisons using the Games-Howell method showed that mean scores between strangers ($M = 3.24, SD = 1.35$), regulars (M

= 3.82, $SD = 1.14$), and insiders ($M = 4.04$, $SD = 1.04$) were statistically significant (Table 29).

Table 29: Means & standard deviations of Social Worlds Theory categorization in relation to WTPH

Variable	<i>M</i>	<i>SD</i>
Strangers (n=86)	3.24	1.35
Tourists (n=83)	3.67	1.2
Regulars (n=72)	3.82	1.14
Insiders (n=76)	4.04	1.04

Based on these results, we can determine that respondents considered Insiders or Regulars are more willing to pay more than tourists or strangers. Insiders would pay around \$60 dollars, whereby regulars were willing to pay around \$56. This is useful when marketing a hostel with a music venue, because people who are listening or playing music frequently, posting about music on social media frequently, or who historically spend money on concert tickets or have traveled to concerts/festivals are likely to be Regulars or Insiders.

Discussion

Implications for Hosteliers

Current trends in hostels have veered toward adding amenities, such as with Poshtels, to give travelers a hotel-like experience (Trejos, 2016). While few hostels have their own attached music venue that programs live music, the study reveals that there is a market for this bundled tourism product, with this segment being willing to pay around \$54 per night. For most hostels, this is higher than the normal cost of a dorm bed depending on the location (Hostelworld, 2017). Hostels with a bar or attached lounge space may want to consider programming live music into their amenities, and

market their hostels with this in mind. Hostels in thriving music destinations like Melbourne, Australia, Nashville, Tennessee, and New Orleans, Louisiana, are likely to have increased visibility for their music scenes and could utilize this scene in their development. Music enthusiasts seem to be willing to pay more for an experience where they see a concert, have a bed near, and get to bond with others who like the same music/artist. Considerations for a hostel wanting to implement this strategy include: regulations, location, and branding. Noise ordinances and regulations regarding late night music are important to venues. In general, noise can be a factor that deters guests from having a satisfactory stay or disturbs nearby residences or businesses. The music venue component of a hostel should be a focal point of marketing materials on a hostels own website, on review sites such as TripAdvisor, and even on ticketing sites for music concerts.

Location is another important aspect. The site for a hostel with a music venue should be carefully selected, such as being in a thriving downtown location, near other music venues, or in an accessible place. Again, noise ordinances may also play a role in location selection. Packaging refers to how a hostel positions or brands themselves as a music venue and accommodation. No matter which markets a hostel is targeting, the music experience should be a defining characteristic. This will help differentiate the product from competitors, bring in hostel-goers who want a unique experience, and concert attendees who typically would stay with their friends or at a hotel. Hosteliers with the ability to incorporate a music venue should find these results helpful, as 317 respondents of the 328 were interested in the product.

Finally, while the study results provide preliminary information regarding WTPH, hosteliars must do their due diligence regarding financial planning and specifically balancing revenues with expenses. Adding a music venue to a hostel or a hostel to a music venue would require considerable capital, but the results from this study offer insight into potential revenue gained which can be leveraged within financial planning scenarios.

Implications for Academia

In conjunction with Social Worlds Theory, this study found that Insiders and Regulars were willing to pay more for a hostel-music experience than Tourists and Strangers. Essentially, a person's commitment, orientation, experiences, and relationships can define what sector of a social world they fall under, which in turn shapes music communities. The more involved a respondent was in the social world, the more they were categorized as Regulars or Insiders, similar to Ditton et al (1992).

This study additionally corroborated what the literature review found about millennials tourism choices – they want to have unique experiences (Benckendorff et al, 2010). Packaging as a factor for tourism accommodation market share is also supported by this study, as pairing lodging with experiences was identified by Kandampully (2000).

Limitations

While this study profiled three different nationalities, obtaining 328 surveys about millennials WTPH, there are certain limitations. To get a more global sample, the

survey could have been administered in other countries, specifically ones of non-English origin. As identified throughout the study, millennials were defined as people born between 1982-2000, which encompasses people aged 16-34 as of 2017. If the entire age group were included, the study may have found different conclusions than the smaller sample of 18-29 year olds.

Limitations with the survey instrument regarding the frequency of going to concerts and festivals; the response options included less than one, one, three to four, or more than four. This excludes the option of two concerts or festivals attended. Furthermore, respondents may not have defined “concerts” the same way; some may have seen live music performed at a pub vs. attending a concert in a park. In the future, defining the exact criteria for a concert entails will provide more precise results. Respondents were also asked how much they spent on concert tickets, but not what they spent at concerts for items like concessions or merchandise, which could have given a broader scope of expenditures when going to a concert.

Finally, the degree field or major of all respondents, and not just those in the United State – Appalachian State University sample could have provided further information on which fields to market to if differences exist.

Further Research

As hostels become more popular, it is possible to imagine this niche market growing in major cities which have many music venues, and in which they can differentiate themselves from a typical concert hall or music club. There are opportunities for future research based on the findings of this study. A few of these are:

- Investigate whether millennials are the main market for this type of establishment, comparing them with other generations,
- Study the genres of music favored by hostel patrons based on geographic region,
- Replicate the study within additional geographical and cultural contexts,
- Investigate the use of hostels when attending a specific music festival (such as South by Southwest in Austin, Texas),
- Investigate specific locations for hostels and if people are willing to pay more based on the destination,
- Study whether self identity as a musician is a factor in WTPH, and how that relates to Social Worlds Theory
- Conduct qualitative research on the most appealing factors when choosing a music-hostel experience, and
- Assuming that most venues would have more tickets than beds in the hostel, study how partnerships with other accommodations/hostels affects perceptions for guests.

Conclusion

This study set out to identify markets for a hostel-music experience based on Social Worlds Theory. It was identified that people who are music enthusiasts, have a history of traveling to concerts or festivals, that listen to or play music frequently, and post about music on social media are factors that contribute to their categorization in Social Worlds Theory. Ultimately, the study found 317 of the 328 respondents were interested in the product, and that Insiders and Regulars were willing to pay more than the average price for a hostel-music experience. While little academic research exists on

hostels as a whole, this study has exposed a potential niche market for hostels and music venues.

Further academic research should be undertaken to determine if other generations besides millennials would purchase this experience, how music is implemented and its success in hostels, and the features that hostel-goers value. Hostels wishing to add a music component should consider the cost-benefit of doing so, and how this differentiates them from a typical hostel. Music travelers are engaging in music tourism through unique experiences, and many hostels have unrealized resources to provide these. As the sharing economy and experiential-based tourism increases, hostels must find new ways to go above and beyond an affordable nights stay. Hostels with music venues addresses this need and delivers a new music tourism product that may drive millennials and music enthusiasts to travel to a destination.

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Appendix A

To: Richard Bergman
Management 3149 NC Hwy 105 S unit A
CAMPUS EMAIL

From: Monica Molina, IRB Associate Administrator
Date: 6/01/2016
RE: Notice of IRB Exemption

STUDY #: 16-0279

STUDY TITLE: The Market for Music: Consumer Perception of Hostels with Music Venues

Exemption Category: (2) Anonymous Educational Tests; Surveys, Interviews or Observations

This study involves minimal risk and meets the exemption category cited above. In accordance with 45 CFR 46.101(b) and University policy and procedures, the research activities described in the study materials are exempt from further IRB review.

Study Change: Proposed changes to the study require further IRB review when the change involves:

- an external funding source,
- the potential for a conflict of interest,
- a change in location of the research (i.e., country, school system, off site location),
- the contact information for the Principal Investigator,
- the addition of non-Appalachian State University faculty, staff, or students to the research team, or
- the basis for the determination of exemption. Standard Operating Procedure #9 cites examples of changes which affect the basis of the determination of exemption on page 3.

Investigator Responsibilities: All individuals engaged in research with human participants are responsible for compliance with University policies and procedures, and IRB determinations. The Principal Investigator (PI), or Faculty Advisor if the PI is a student, is ultimately responsible for ensuring the protection of research participants; conducting sound ethical research that complies with federal regulations, University policy and procedures; and maintaining study records. The PI should review the IRB's list of PI responsibilities.

Appendix B

Thank you for agreeing to complete this survey. The survey is designed to assess the market demand for a hostel and music event package. We also want to learn more about your musical involvement and how that relates to your perception of music communities, music concerts, and music festivals.

We ask that you respond to the questions as honestly as possible. All responses will remain anonymous.

The survey should take approximately 15 minutes of your time. If you have any questions concerning the research study, please contact RJ Bergman at bergmanre@appstate.edu. Thank you in advance for taking the time to share your insights with us!

What is your gender?

1. Male
2. Female
3. I prefer not to answer

What is the highest level of education completed?

1. Did not attend school
2. Primary Education
3. Secondary Education
4. Some College
5. Associates Degree/Trade School/Apprenticeship
6. Bachelors Degree
7. Masters Degree
8. Doctorate

What is your age?

1. 18
2. 19
3. 20
4. 21
5. 22
6. 23
7. 24
8. 25
9. 26
10. 27
11. 28
12. 29

Do you have a passport?

1. Yes

2. No

What best describes your work status? Check all that apply.

1. Full-time student
2. Part-time student
3. Full-time work
4. Part-time work
5. None of the above

Do you consider yourself a music enthusiast? (Someone who feels enthusiasm for music?)

1. Yes
2. Somewhat
3. No

How often do you listen to music?

1. I don't really listen to music
2. I listen, but very little
3. I listen occasionally
4. I listen routinely
5. I am almost always listening to music

How often do you play music instruments?

1. I don't play music
2. I play, but very little
3. I play occasionally
4. I play routinely
5. I am almost always playing music

What are your favorite music genres? Please select up to 3

1. Alternative
2. Blues
3. Classical/Opera
4. Country
5. Dance
6. Electronic
7. Hip-Hop/Rap
8. Holiday
9. Religious
10. Jazz
11. Latin
12. New Age
13. Pop
14. R&B/Soul
15. Reggae
16. Rock

17. Singer/Songwriter/Folk
18. World Music
19. Other (please specify)

How often do you go to a musical concert? (A public music performance in which a number of singers or instrumentalists, or both, participate)

1. Never
2. Less than once a year
3. About once a year
4. Three to four times a year
5. More than four times a year

Within the last 2 years how many times have you travelled more than 50 miles to see a musical concert?

1. [Open Ended]

If you did travel more than 50 miles to see a concert, where did you stay?

1. Friends or Relatives
2. Hotel/Resort/Motel
3. AirBnB, Couchsurfing, etc
4. Hostels/Backpackers
5. I typically don't stay overnight
6. Other (please specify)

If you have not travelled more than 50 miles to see a concert, why not?

1. [Open Ended]

How often do you go to a musical festival? (an entertainment event featuring a number of musical performers or bands of a certain genre or centered on a theme)

1. Never
2. Less than once a year
3. About once a year
4. Three to four times a year
5. More than four times a year

Within the last 2 years how many times have you travelled more than 50 miles to see a musical festival?

1. [Open Ended]

If you did travel more than 50 miles to see a festival, where did you stay?

1. Friends or Relatives
2. Hotel/Resort/Motel
3. AirBnB, Couchsurfing, etc
4. Hostels/Backpackers
5. I typically don't stay overnight

6. Other (please specify)

If you have not travelled more than 50 miles to see a festival, why not?

1. [Open Ended]

Please read the following scenario. How much are you willing to pay for one night and a concert ticket?

A hostel in a major city is opening up that provides free breakfast, wi-fi, lounge spaces, local events, and a clean, decorated establishment. This hostel offers female and mixed dormitories as well as private rooms. This hostel has a music lounge attached to it which hosts live concerts almost every night. Local, regional, and occasionally national acts play at the venue. As a guest, you are already on the premises and have the opportunity to chat with and meet most artists before or after their show. These concerts are included in the room price and are advertised in the booking to encourage other fans to stay in the hostel as well. How much on average would you be willing to pay for one night and a concert ticket?

1. \$20
2. \$40
3. \$60
4. \$80
5. I would not be interested in this product
6. Other (please specify)

How much money do you spend on music downloads, purchasing CD's, subscriptions to Spotify, etc. each year?

1. [Open Ended]

How much money do you spend on concert tickets each year?

1. [Open Ended]

How often do you post about music on social media (Facebook, Instagram, Twitter, Snapchat, etc.)? Please indicate how often you post about the following. (5 options: Never, A few times a year, About once a month, About once a week, Daily)

Playing musical instruments/singing

Listening to music

Performing, producing, recording, or editing music

Attending a concert or festival

Likert Scale Questions

(5 options available, Strongly Disagree, Disagree, Neither Agree or Disagree, Agree, and Strongly Agree)

A concert can be enjoyable even if I've never heard of the artists

A concert can be enjoyable even if I don't meet the artists

A concert can be enjoyable even if I am not at the front of the crowd

A concert can be enjoyable even if I don't buy band merchandise

I go to music concerts in order to learn about the music

I go to music concerts in order to network with musicians

An intimate atmosphere of a concert is important to me

I prefer to attend a concert featuring 3 artists/bands or less

When I travel I am interested in seeing a band that identifies as part of the local culture.

I believe that listening to music benefits my well being.

I would prefer to listen to music over other passive recreational activities

I would prefer to attend a music concert or festival over other passive recreational activities outside your home

I would prefer to play music or sing over other active recreational activities

What factors might influence you to choose music-related activities over others (non-music-related activities)?

1. [Open Ended]