

The Influence of Cultural Inheritance in Residents' Subjective Well-Being, in Ethnic Festivals: The Case of Oktoberfest in Blumenau, Santa Catarina, Brazil

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Abstract

Aiming to analyze the relationships between residents' perception of their subjective well-being, their ethnicity, and Oktoberfest in Blumenau, we developed this quantitative and descriptive research. We statistically analyzed the opinions from 400 respondents, all residents from Blumenau, Santa Catarina. The main results revealed that people more related to German culture tend to value Oktoberfest more than those that are not. Therefore, besides contributing to the research field of festivals and emerging themes, this research is helpful to destination managers and festival planners whose focus is an ethnic-cultural inspiration.

Keywords: ethnicity, subjective well-being, residents, impacts, Oktoberfest.

1. Introduction

Festivals have been widely used by destinations to promote and value the community culture. However, in the last few years, these festivals have also become a significant tool to promote local tourism (Fiuza, Zucco, Añaña & Sohn, 2019), especially due to their developing community potential, highlighting a destination, and targeting repositioning economic development, but also for the possibility to assign a cultural legacy in the host city (Pavluković, Armenski, & Alcántara-Pilar, 2017). The achievement of such events has offered significant opportunities to strengthen the cultural ties between individuals, regarding both supply and demand (Fiuza, Zucco & Kraus, 2019), since while residents show their heritage and tradition, tourists enjoy an authentic cultural experience (Tanford & Jung, 2017; Tontini, Branco, Brandt, Ronchi, Oliveira, & Zanchett, 2018).

An example of a festival that seeks to represent the local culture, ethnicity, and the community as a tourist destination is Oktoberfest. This event began in Munich, Germany, but it takes place in many cities around the world that were colonized by Germans. In the Brazilian context, the Blumenau Oktoberfest in Santa Catarina is recognized as the largest Oktoberfest in America and the second largest in the world (Zucco, Quadros, Schmitt & Fiuza, 2017; Zucco, 2012).

Oktoberfest in Blumenau started in 1984, inspired by the one in Munich. According to Zucco (2012), celebrating the festival was driven by the residents' effort to save the German culture in the destination and to rebuild the city, which was devastated by two great floods in 1983 and 1984. The festival schedule contains several activities seeking to highlight the cultural wealth and folklore to the Blumenau residents and tourists through a passion for music, dance, and German cuisine, which are significant elements of the Germanic traditions, brought to Santa Catarina by the colonizers (Zucco, 2012).

Oktoberfest attracts not only residents but a great public from all over the country to enjoy the event. This statement is confirmed in the data released by the festival, in which, in 2019, it received more than 576,500 visitors during the 19 days of the festival (Nsc Total, 2019). They highlight that over 516,700 dishes were served and 526,200 liters of beer. Therefore, the relevance of this event in the cultural, ethnic, and economic levels to the destination is proved. At the same time, the event can attract a significant flow of tourists; it can represent the ethnic and identity features of the hosting community, maintaining and valuing the German culture.

Despite the relevance of festivals to destinations, Rinaldi and Sergio (2019) argue that the destinations began to value and significantly recognize their achievement as a possibility to value the culture and promote tourism in the community only in the last two decades. However, in academia, this theme reached significant relevance only in the last decade. Wilson, Arshed, Shaw, and Pret (2017) verified such a statement by mapping all the studies that had festivals as the central theme and realized that more than half of the papers were published after 2010. Despite its considerable growth, the existing research has not yet sufficiently considered the experiences of those who live in the community hosting the events and their planners, managers, and volunteers (Getz & Page, 2016; Yolal, Gursoy, Uysal, Kim, & Karacaoğlu, 2016). Investigating the prospects of such parties would allow future studies to consider broader festival experiences (Fiuza et al., 2019; Rinaldi & Sergio, 2019; Wilson et al., 2017). The available literature has shown an increasing concern not only with impact, but with conflicts related to authenticity and commodification of festival culture (Akhoondnejad, 2016, Getz; Page, 2016). The attendants and especially the residents have been less tolerant towards events that do not represent their habits in a realistic way (Han, Wang, Zheng & Zhang, 2017).

Currently, a series of studies has been developed seeking to analyze the different impacts of festivals on destinations in an isolated way (Fiuza et al., 2019; Han et al., 2017; Yolal et al., 2016), as well as the relationship between such events and the subjective well-being of the residents of the host community (Yolal et al., 2016; Ivlevs, 2017; Chou, Huang & Mair, 2018). However, authors such as Getz and Page (2016) defend the need to conduct research that seeks to establish relationships between the different themes related to festivals in order to expand knowledge about the immersion and relevance of such events for the hosting communities. Wilson et al. (2017) make clear in their study the need to flesh out research that seeks to understand the process of how local identity is portrayed through festivals and to analyze how cultural change is perceived by society.

Thus, the importance of analyzing the festival's identity for the hosting community is perceived, and little research on the theme has addressed the relevance of festivals' ethnicity in the view of the hosting community. Grünwald (2003) argues that ethnicity within the context of tourism should be seen as a form of social organization where the focus is not on the cultural trait attributed by the residents' ancestors but, instead, as the very characteristic of

self-attribution: the group of members who identify themselves and are identified by others as a distinct population. In other words, ethnicity should not be approached as a past identity or inherited by a people but rather as the traits, habits, and values that currently shape and form a community.

Accordingly, the present paper seeks to contribute to the research on festivals by addressing two emerging themes together, the impact of festivals and the subjective well-being of destination' residents, and insert a new focus of research seeking to comprehend more deeply the influence between the ethnicity of the society and its relationship with the festival. Our primary purpose is to analyze the relationships between residents' perceptions of subjective well-being, ethnicity, and Oktoberfest in Blumenau.

In order to achieve our goal, the research was structured in six sections. The introduction presents the festival that will be analyzed and the contextualization of the research theme. The second section seeks to develop the hypotheses and present the theoretical framework. Subsequently, the research methodology is described. The fourth section presents the results, followed by the conclusions. Finally, the references utilized make up the sixth section.

2. Hypotheses Development

The benefits provided by festivals are many, and the cultural ones have demonstrated significance for their achievements within the community: renewing pride in the residents' culture, reinforcing their identity, showcasing their cultural heritage, and maintaining societal tradition (Pavluković et al., 2017; Rinaldi & Sergio, 2019; Yolal et al., 2016). Recent studies (Fiuza, Zucco & Kraus, 2019) demonstrated that the residents' identity has a direct and significant relationship with their perception of the festival costs and benefits. However, considering the characteristics found in the Oktoberfest in Blumenau, it can be assumed that:

H1 – The cultural benefits associated with Oktoberfest strengthens Blumenau's residents' feeling of collective well-being.

Festivals and fairs usually are developed seeking to promote and value the destination culture in order to bring people together and support a tourist destination nationally and internationally (Tanford, & Jung, 2017; Tontini et al., 2018; Yolal et al. 2016). Studies revealed that residents tend to value a festival in a more precise way when it already has some representativeness and recognition as an established event, realizing more clearly the benefits generated by it in the community (Tontini et al., 2018). The Oktoberfest in Blumenau is considered the second largest one in the world and the largest one in Brazil (Zucco et al., 2017), demonstrating at a national and international level the German culture sustained by the people of Blumenau. Considering that this festival has consolidated itself as a large event, capable of attracting a significant number of visitors each year, promoting the city, and creating jobs and other opportunities, it is expected that:

H2 – The community benefits associated with Oktoberfest strengthens Blumenau's residents' feeling of collective well-being.

Despite festival benefits, festivals tend to cause some costs to the hosting communities as well. Studies such as Fiuza, Zucco, Añaña and Sohn (2017), Gursoy, Kim and Uysal (2014), Pavluković et al. (2017), Yolal et al. (2016) and Ivles (2017) sustain that the main negative impacts promoted by these events are changes in the local routine, environmental damage, increased cost of basic services, noise pollution, increased rate of vandalism and crime, and commercialization and exploitation of traditional culture and ways of life. These negative aspects may threaten the positive local attitude towards hosting the event. More importantly, the negative attitude can seriously damage the event's image and reduce community support (Pavluković et al., 2017). The tendency is that the bigger

the event, the higher the chances for the community to perceive the costs of achieving it, therefore influencing several aspects, such as the collective well-being (Yolal et al., 2016). The Blumenau Oktoberfest fits in this context. Considering that the festival lasts 19 days and attracts around 576,5 thousand visitors to each event, it is expected that:

H3 – The disorders produced by Oktoberfest negatively impact the collective well-being feeling of the residents of Blumenau.

Social identity is a concept that the individual creates of himself, by perceived association or similarity with some groups (Palmer, Koenig-Lewis & Jones, 2013; Haobin Ye, Qiu Zhang, Huawen Shen & Goh, 2014). Social identity theory suggests that people can assume multiple identities according to different criteria (e.g., an organization member, religion, gender, age, generation) in order to create a more positive image of themselves and strengthen self-esteem (Haobin Ye et al., 2014). Ethnicity is also a collective identity, a concept that involves tradition, religion, language, nationality, physical look, and territory, among others, that give the individual a sense of belongingness to the ethnic group (Mateos, 2007).

Within this context, despite its strong appeal to tourism, festivals cannot be considered as a mere representation to be seen and appreciated by visitors. Increasingly, the concern is expressed not only about the impacts but also about conflicts related to the authenticity and commercialization of the festival culture (Akhoondnejad, 2016; Getz & Page, 2016). The attendees and especially the residents of destinations have shown less tolerance for events that do not represent their habits and traditions in a realistic way (Han et al., 2007). The same result is seen in the Oktoberfest in Blumenau, although the event is still considered an opportunity to access and honor ancestry, which involves and gathers the residents through music, dance, cooking, and retrieving costumes from the past. Studies such as Fiuza, Zucco, Añaña, and Sohn (2019), Fiuza, Zucco and Kraus (2019) and Yolal et al. (2016) demonstrate that identifying with a festival's identity influences directly the residents' perception of the festival impacts on destinations. This allows us to assume that:

H4a – The [higher] identification with Germanic culture favors the attribution of cultural benefits to Oktoberfest by Blumenau residents.

H4b – The [higher] identification with Germanic culture favors the attribution of community benefits to Oktoberfest by Blumenau residents.

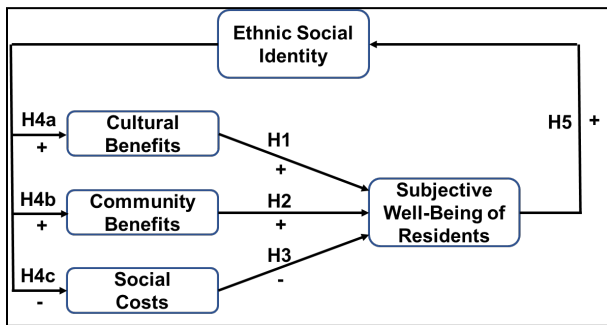
H4c – The [higher] identification with Germanic culture means that the social costs attributed to Oktoberfest are perceived less critically by Blumenau residents.

Festivals and special events generate community benefits, produce business opportunities, develop social incentives, help protect the local culture, and strengthen social cohesion and residents' pride (Fiuza et al., 2019; Gursoy, Ouyang, Nunkoo, & Wei, 2019; Gursoy, Kim, & Uysal, 2004; Yolal et al., 2016). Even though it is a construction, an invented tourist scenario, many Blumenau inhabitants express, in the festival, what they experience as an inherited tradition (Zucco et al., 2017). Therefore, we propose:

H5 – The subjective well-being created by Oktoberfest reinforces the ethnic-social identity of Blumenau residents.

The theoretical model used in this research is proposed in Figure 1.

Figure 1. Proposed model



3. Methodology

The present paper is primarily quantitative, descriptive in its nature, and analyzes the opinions of 400 respondents chosen by convenience; they all live in Blumenau, Santa Catarina, Brazil. For the data collection, we used a questionnaire with 25 items based on a 5-point Likert-type scale and six items regarding demographic characteristics. The instrument has twenty variables proposed by Yolal et al. (2016) and five more variables regarding ethnic-social identity: (1) the Oktoberfest promotes Blumenau throughout Brazil; (2) the Oktoberfest promotes Blumenau abroad; (3) the Oktoberfest promotes German culture to Brazil; (4) Blumenau residents are proud of their German tradition; and (5) I am proud and like to live in Blumenau. The questions appropriate to this extra set were based on the literature and experts' recommendations.

The data utilized for this study were collected between September 3 and September 16, 2019 with the population living in Blumenau aged 16 years or over, resulting in a sample of 400 valid questionnaires. Thus, the survey had a 95% confidence interval and a 5% margin of error. The analysis involved three steps: (a) an exploratory factor analysis (EFA) to verify the variables adequacy to the theoretical construct and to evaluate possible needs for re-specification; (b) a measurement model analysis through a confirmatory factor analysis (CFA) to assess the reliability and validity of the identified factors; and (c) a structural model analysis to evaluate the research hypotheses. The measurement and structural models were developed and analyzed by the IBM-AMOS-21.0 software. The measurement model was specified based on the identified factors of the EFA, in light of Yolal et al.'s (2016) findings and adjusted to fit three undefined variables.

4. Results and Discussions

Through the exploratory factor analysis (EFA), we identified five dimensions consistent with the theoretical model. Three variables presented crossloads in two or more dimensions, but they were kept in the model for further assessment in the confirmatory phase. The EFA results are not presented due to lack of space, and since it is only a preparatory procedure for the CFA.

Of the three undefined variables that were identified in the exploratory phase, one ("the Oktoberfest is like a showcase for new ideas and business") has adjusted itself as an indicator of cultural benefits, so it was redefined as "CULT_BEN4". The other two ("the Oktoberfest is an expensive party for local residents, and incompatible with the resources of most people living in Blumenau" and "the Oktoberfest generates negative competition between Blumenau and neighboring cities") were removed as not a fit to the model. As shown in Table 1, all the indicators reached acceptable levels of significance in the factors to which they were attributed, and the general FIT measures also complied with the requirements (Bagozzi & Yi, 2012) in practically all indexes: IFI = 0.910; TLI = 0.894; CFI = 0.909; RMSEA = 0.059; CMIN = 525.53; DF = 219; P = 0.00.

Table 1. Measurement Model

	Factors / Variables	Regression Weights	S.E.	C.R.	P	Standardized Regression Weights
Ethnic and Social Identity	SOC_IDT1	1,000				0,488
	SOC_IDT2	0,827	0,102	8,134	***	0,456
	SOC_IDT3	1,180	0,152	7,766	***	0,545
	SOC_IDT4	1,616	0,179	9,013	***	0,728
	SOC_IDT5	2,108	0,236	8,946	***	0,716
Social Costs	SOC_COSTS1	1,000				0,741
	SOC_COSTS4	0,493	0,082	5,975	***	0,389
	SOC_COSTS3	0,535	0,084	6,383	***	0,423
	SOC_COSTS2	0,745	0,094	7,890	***	0,624
Cultural Benefits	CULT_BENEF1	1,029	0,110	9,389	***	0,612
	CULT_BENEF2	0,955	0,100	9,558	***	0,628
	CULT_BENEF3	1,364	0,134	10,159	***	0,690
	CULT_BENEF4	1,000				0,569
Community Benefits	COMMUNIT_BENEF1	1,030	0,093	11,087	***	0,740
	COMMUNIT_BENEF2	1,307	0,115	11,382	***	0,774
	COMMUNIT_BENEF5	1,000				0,600
	COMMUNIT_BENEF4	1,335	0,124	10,801	***	0,710
	COMMUNIT_BENEF3	1,400	0,139	10,054	***	0,640
Subjective Well Being	SUBJ_WELL_BEING5	0,578	0,057	10,166	***	0,508
	SUBJ_WELL_BEING4	0,892	0,056	15,845	***	0,738
	SUBJ_WELL_BEING3	0,988	0,055	17,861	***	0,811
	SUBJ_WELL_BEING1	1,000				0,819
	SUBJ_WELL_BEING2	0,975	0,058	16,905	***	0,776

The convergent validity was attested by the indicator loads, all higher than 0.5 and significant ($t > 1,96$; $p < 0,05$) in the factors (Anderson & Gerbing, 1988). The composite reliability (CR) met the expected minimum of 0.7 in all constructs (Bagozzi & Yi, 2012), and the average variance extracted (AVE) exceeded the expected minimum value of 0.5 in four of the five factors, being slightly below that value in collective well-being. Table 2 shows the CR and AVE indexes for each factor, as well as the correlations between them; the square root of the AVE is shown in the matrix main diagonal, in bold, to facilitate the evaluation of the discriminant validity.

Table 2. Composite Reliability, AVE and Discriminant Validity (Fornell & Larker criterion)

	Ethnic Social Identity	Cultural Benefits	Social Costs	Community Benefits	Subjective Well Being
Ethnic Social Identity	0,802				
Cultural Benefits	0,937	0,780			
Social Costs	-0,374	-0,351	0,826		
Community Benefits	0,683	0,640	-0,256	0,718	
Subjective Well Being	0,746	0,789	-0,397	0,510	0,673
CR	0,828	0,799	0,789	0,832	0,830
AVE	0,643	0,608	0,683	0,516	0,453

The discriminant validity of the model was assessed by the Fornell and Larcker (1981) criterion and by the method proposed by Bagozzi and Philips (1982). According to the Fornell and Larcker (1981) criterion, there is discriminant validity when the square roots of all the AVEs are higher than the correlations among the corresponding factors. The evaluation based on this criterion attested to the existence of discriminating validity in the social costs and in the community benefits of the event (Table 2) but presented values slightly below those desired in the other factors, and for this reason, they were evaluated by a second criterion.

The Bagozzi and Philips (1982) method considers the existence of discriminant validity between two factors when the correlation between them, once forced to the unit, degrades the general model adjustment significantly. According to Anderson and Gerbing (1988, p. 416), “the discriminant validity for two estimated constructs can be assessed by constraining the estimated correlation parameter between them to 1.0 and then performing a chi-square difference test on the values obtained for the constrained and unconstrained models”. The examination based on this criterion (Table 3) confirmed the existence of significant differences in chi-square between the freely estimated model and the three restricted models, attesting that the variables forming cultural benefits, subjective well-being, and ethnic-social identity refer to different constructs.

Table 3. Discriminant Validity (Bagozzi & Phillips criterion)

Estimates	Unrestricted Model	Restricted Model 1	Restricted Model 2	Restricted Model 3
Chi-Square	525,50	566,00	596,50	676,00
DF	220	221	221	221
Chi-Square Difference	-	40,50	71,00	150,50
Sig. Chi-Square Difference (DIST.QUIQUA)	-	0,000	0,000	0,000

Restricted Model 1: Correl Cult Benefits & Subjective Well Being = 1

Restricted Model 2: Correl Ethnic Social Ident & Subjective Well Being = 1

Restricted Model 3: Correl Ethnic Social Ident & Cultural Benefits = 1

The hypotheses were tested through a structural equation model developed in the IBM-AMOS-21.0 software from the measurement model. The result confirms that the cultural benefits and the social costs associated with the event have significant influences on subjective well-being, the first one positively and the second one negatively, which supports H1 and H3 respectively. This finding corroborates the study of Yolal et al. (2016) that identified the positive and negative influence of festivals on the residents’ well-being. The influence of ethnic-social identity on cultural benefits, community benefits, and social costs was confirmed as hypothesized, supporting H4a, H4b, and H4c respectively. These findings are in accordance with previous studies pointing to residents' positive

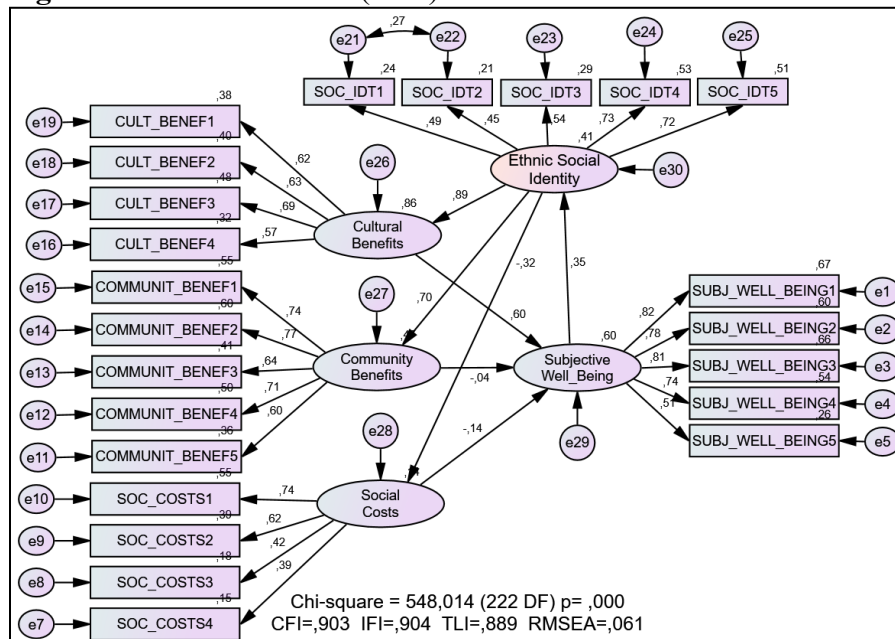
perception about the festival coming from their identification with the event, through habits and traditions they perform collectively to delight visitors (Han et al., 2017; Fiuza, Zucco, Añaña & Sohn, 2019; Fiuza, Zucco, & Kraus, 2019; Yolal et al., 2016). However, contrary to the authors' expectation, the influence of community benefits on the residents' subjective well-being (H2) was not confirmed, nor was the contribution of subjective well-being to the strengthening of ethnic-social identity (H5), due to lack of statistical significance, as shown in Table 4.

Table 4. Structural Relationships

Preceding Factors	Depending Factors	Regression weights	P	Stand. Regression weights
Community Benefits	→ Subjective Well-Being	-0.094	0.627	-0.040
Cultural Benefits	→ Subjective Well-Being	1.098	0.002	0.601
Ethnic Social Identity	→ Community Benefits	0.757	0.000	0.695
Ethnic Social Identity	→ Cultural Benefits	1.253	0.000	0.892
Ethnic Social Identity	→ Social Costs	-0.709	0.001	-0.321
Social Costs	→ Subjective Well-Being	-0.168	0.018	-0.144
Subjective Well-Being	→ Ethnic Social Identity	0.136	0.243	0.350

The structural model, the corresponding standardized loads, and the FIT measures are shown in the Figure 2. The CFI, IFI, and RMSEA indexes met the expected minimum/maximum values of 0.9, 0.9, and 0.06, respectively (Bagozzi & Yi, 2012); the TLI was slightly lower than the minimum expected, but it was tolerated for being at the boundary edge.

Figure 2. Structural model (final)



4.1 Theoretical Contributions and Practical Implications

This paper offers theoretical and managerial implications. By adding ethnicity to the central theme of the research, we contribute to the advancement of the literature concerning festivals and provide a better perspective of the management and planning of such events. By knowing the influence of ethnicity and the importance of positive and negative impacts on residents' subjective well-being, managers can organize the event in a way that maximizes the sense of belonging of the local community, increasing their feelings of pride.

4.2 Limitations and Future Research Recommendations

Despite the contributions made by this study, some limitations need to be addressed. First, the numbers of variables utilized to measure subjective well-being and ethnicity, using more specific variables on the topic, could increase the knowledge about them. For future research we recommend including a qualitative approach to identify a set of variables representing the festival and visitors' ethnicity, which, until now, there has been no evidence of that in the literature. We further recommend trying to collect larger sample to perform a cluster analysis to comprehend the differences between the resident groups and their perspectives. Finally, we also suggest the replication of this study in other cultural festivals, seeking to identify possible similarities and differences, analyzing them, and understanding the complexity of the relationship between residents and aspects of festival interference in the hosting communities.

5. Conclusions

The present paper assumes that, because it is a festival, the Oktoberfest in Blumenau encourages interaction between people of different cultures, enhances the city economy, and generates several opportunities for residents. As it creates these business opportunities and entertainment, it also produces adverse outcomes on the people and the environment. Because it is an event designed to rescue and value the inherited culture, the (greater or lesser) identification with the ethnicity of the former colonizers influences the way the residents perceive and assess the costs and benefits of the event.

The study utilized a theoretical model inspired by Yolal et al. (2016), to which was added a new construct, the respondents ethnic-social identity (the ethnicity), which is supposed to influence and reinforce the residents' involvement in the event. As in the original model, it was also expected to identify significant influences of the costs and benefits attributed to the event on the subjective well-being that the event can create for the population. The factors composition, the model adjustment, and the significance of the relationships between the constructs were evaluated through structural equation modeling, conceived by the literature, and improved with the exploratory and confirmatory factor analysis performed with the software package IBM-AMOS-21.0.

The results are consistent, reliable, and valid. The identified factors present logical sense, convergent validity, discriminant validity, indexes of composite reliability (CR), and average variance extracted (AVE) compatible with the recommendations in the literature. The results corroborate the findings of Yolal et al. (2016) regarding the influence (positive) of the cultural benefits and (negative) of the social costs of the event on the subjective well-being of the resident population. However, it does not support the expected positive influence of community benefits on subjective well-being. In other words, our work confirms that social costs resulting from the event degrade the sense of wellness among residents. Moreover, cultural benefits such as conviviality and integration amongst people, the opportunity for creating leisure, prospecting new ideas and business, and learning about new things are qualified enablers of subjective well-being. However, contrary to what was predicted, measurable benefits such as destination promotion, tourism improvement, and economic growth, in this case, are not associated with residents' welfare.

The result also confirms that residents' ethnic-social identity improves perceived benefits and reduces criticism of the social costs of the event, but the opposite does not occur. That is, people more identified with Germanic culture tend to value Oktoberfest more than those who do not, but involvement, appreciation, or enchantment with the fair does not guarantee that the sense of "Germanity" will be strengthened among the event's participants. The present paper replicates a previous study, carried out in another context, and innovates by adding ethnicity as an element of valuation of a tourist product: an event. The reviewed literature suggests that large events create positive and negative outcomes and that these influence the subjective well-being of the resident population. However, as far as we know, there is still little literature that includes ethnicity as a perceptual filter in the evaluation of the event's costs and benefits. This study expands the theoretical field and could be useful to destination managers and event planners, mainly to those involved with the planning/execution of ethnic-cultural inspired festivals.

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