Creative Industries Journal

ISSN: (Print) (Online) Journal homepage: https://www.tandfonline.com/loi/rcij20

The impact of festivalization on the Dutch live music action field: a thematic analysis

Martijn Mulder, Erik Hitters & Paul Rutten

To cite this article: Martijn Mulder, Erik Hitters & Paul Rutten (2020): The impact of festivalization on the Dutch live music action field: a thematic analysis, Creative Industries Journal, DOI: 10.1080/17510694.2020.1815396

To link to this article: https://doi.org/10.1080/17510694.2020.1815396

CREATIVE INDUSTRIES JOURNAL
https://doi.org/10.1080/17510694.2020.1815396

The impact of festivalization on the Dutch live music action field: a thematic analysis

Martijn Mulder[a], Erik Hitters[a] and Paul Rutten[b]

[a]Erasmus Research Centre for Media, Communication and Culture, Erasmus University Rotterdam, Rotterdam, the Netherlands; [b]Creating 010 Research Centre, Rotterdam University of Applied Sciences, Rotterdam, the Netherlands

ABSTRACT

In the global pop music industries, revenue models have shifted from physical record sales to streaming services and live performances. At the same time, the supply of live music performances has changed as a result of festivalization. This study aims to understand the effects of festivalization on the strategic action field (SAF) of the Dutch live music ecology. This paper is grounded in a qualitative thematic analysis based on in-depth interviews with directors of pop music venues and festivals. Contributing to the scholarly literature on festivalization we approach this concept from inside the strategic action field (SAF) of live music and place it within the context of the rapidly changing music industries. Among other results we emphasize the significant multiple value creation produced by festivals, the strategic advantages of festivals in relation to traditional music venues and the potential co-evolution within the live music action field.

ARTICLE HISTORY
Received 19 December 2019
Accepted 18 August 2020

KEYWORDS
Festivalization; live music; SAF; music industries; co-evolution

Introduction

Music industries worldwide have been subject to change and innovation since the emergence of commercial pop music in the late 1950s. The introduction of vinyl and the CD, as well as the expansion of pop music festivals and brick-and-mortar venues, drove pop music up to a successful global industry during the second half of the 20th century. There has, however, been a more disruptive change in the 2000s - a rapid decline in physical sales as a result of mp3 and streaming services. This transformed the music industries, which had long focused on selling records, with these sales producing approximately 90% of their total revenues (Naveed, Watanabe, and Neittaanmäki 2017). This change has been countered by a recent growth in the income received from music streaming services. Yet streaming is not the only, or the most important, factor when it comes to explaining the revival of the music industries,

CONTACT Martijn Mulder mulder@eshcc.eur.nl Erasmus Research Centre for Media, Communication and Culture, Erasmus University Rotterdam, Rotterdam, the Netherlands.

with revenues from live music rising more than those from digital sales between 2010 and 2015 (Naveed, Watanabe, and Neittaanmäki 2017). The economic importance of live music performances has increased since the 1990s, as signaled by Frith (2007), Holt (2010) and Mortimer, Nosko, and Sorensen (2012). Indeed, a study by EY (2014), which was commissioned by the European Grouping of Societies of Authors and Composers (GESAC), revealed that 50% of the turnover of the music industries in EU countries in 2012 came from this source. This sharp increase in the size of the share of live music performances mainly benefits the industry and the top artists. Indeed, although performing live has always been the main source of income for many regular pop acts (Rutten and Smeets 1997; Connolly and Krueger 2005; IJdens, Von der Fuhr, and De Rooij 2008), these artists have not seen a significant growth in their revenues from this income stream (Connolly and Krueger 2005; Krueger 2019).

It is not only the position of live music within the pop music industry that has changed over the last two decades; the predominant focus of the live music sector has shifted from designated brick-and-mortar venues to more fluid forms of staging music, in particular festivals. Indeed, some believe that festivals represent the heart of the music industries today, because of the revenues they generate (Webster and McKay 2016) and their audience reach (Frith 2007). Although pop music festivals have been around since the 1960s, the accelerated growth and commercialization of this sector took place from 2000 onwards, as reported in countries such as the UK (Webster 2014) and the Netherlands (Van Vliet 2019; Respons Market Research 2019). Festivalmonitor reports a 38% increase in the number of Dutch music festivals between 2014 and 2018 (Respons Market Research 2019), while the Dutch Festivalatlas revealed that 66% of the music festivals held in 2018 had only existed for ten years or less (Van Vliet 2019). This rapid growth is usually indicated by the terms 'festivalization' or 'hyperfestivity' and implicates at the same time an increasing economic importance of this industry. Several scholars (e.g., Holt 2010; Van der Hoeven and Hitters 2019; Webster et al. 2018) have emphasized the economic potential of live music. Nevertheless it is difficult to measure the total economic impact of this sector, if only because of the high amount of indirect jobs (e.g. suppliers, technicians) and spin-off effects that characterize the live music industry. Yet, some indicators for the growing economic impact of live music can be presented: the value of live music to the Australian community was estimated at almost 10 billion US Dollar for 2014 (Whiting 2015); UK Music reported that over 2018 "*the UK's live music sector's contribution to the economy grew to a record high of £1.1 billion, which is a 10% overall rise on 2017*" (UK Music 2019); finally, the largest global live music company (Live Nation) reported over 2019 the ninth consecutive year of growth, with a year-over-year revenue growth of 7% and the total concert attendance (for Live Nation shows) growth of 5% to $98 Million (Live Nation 2020).

There have been two parallel developments in live pop music: 1) the changing role and increasing importance of live performances in the music industries in general; and 2) the changing supply of live music performances. It is therefore important to better understand how the live music industry has changed, and how these changes affect the key players involved in staging this product. In recent years, many studies have been conducted on developments in the music industries overall, and the live music sector in particular. However, the vast majority of the research on the latter is focused on specific forms: pop concerts (e.g., Behr et al. 2016; Brown and Knox 2017; Webster et al. 2018) or pop music festivals (e.g., Bowen and Daniels 2005; Leenders et al. 2005; Orosa Paleo and Wijnberg 2006; Crossley and Emms 2016). Despite the increasing importance of the live music industry and the rapid growth of the music festival sector, research with an integral approach to live music is rare. Moreover, few studies have been conducted on how to interpret the proliferation of the music festival on the live music industry overall. Most of the research on festivalization has focused on the effects of festivals on urban development (e.g., Oakes and Warnaby 2011; Waitt 2008) or local communities (e.g., Bennett, Taylor, and Woodward 2014), with none examining their impact on the developing live music industry itself. This paper will remedy this within the context of the Dutch live pop music industry.

This exploratory research has two goals: 1) explaining the concept of festivalization in pop music using the experiences of the key players in the live music industry; and 2) analyzing the impact of festivalization on the live pop music ecology in the Netherlands. The following research question has been formulated: How does festivalization affect the strategic action field (SAF) of the Dutch live music ecology? A theoretical framework will be described that integrates the different elements of the research goals. Then, an empirical study will be presented that: (1) maps how festivalization is perceived within the live music industry; and (2) analyzes the interrelationship between permanent and temporary stages for this music in the Netherlands.

Conceptualizing developments in live music

A multi-level approach was used to answer the research question described above. The first, most general, level concerned the music industries overall, while the second comprised the live music industry, and the third the key institutions that stage live music. Such a multi-layered perspective was essential when it came to understanding festivalization and its effects. Indeed, this evolution cannot be isolated within the levels of music institutions or live music itself, because it is an integral part of the changing music industries and has a direct impact on their lower levels. These different layers are elaborated on in this paper and, ultimately, integrated within a general framework.

Changing music industries: co-evolution

Recent developments in the music industries have often been described as a shift from physical products to online streaming. The trigger for this was the emergence of online file sharing in the 1990s (Tschmuck 2012). As data on the development of revenues in the US music industries show (Figure 1), those received from physical sales of recorded music began to fall from 1999 onwards as a result of the launch of download software like Napster. This drop in the number of physical sales has continued since the introduction of music streaming services in 2007, which heralded the ultimate decline of an industry founded on the sales of music carriers. Nonetheless, several studies (e.g, Naveed, Watanabe, and Neittaanmäki 2017; Krueger 2019) show that

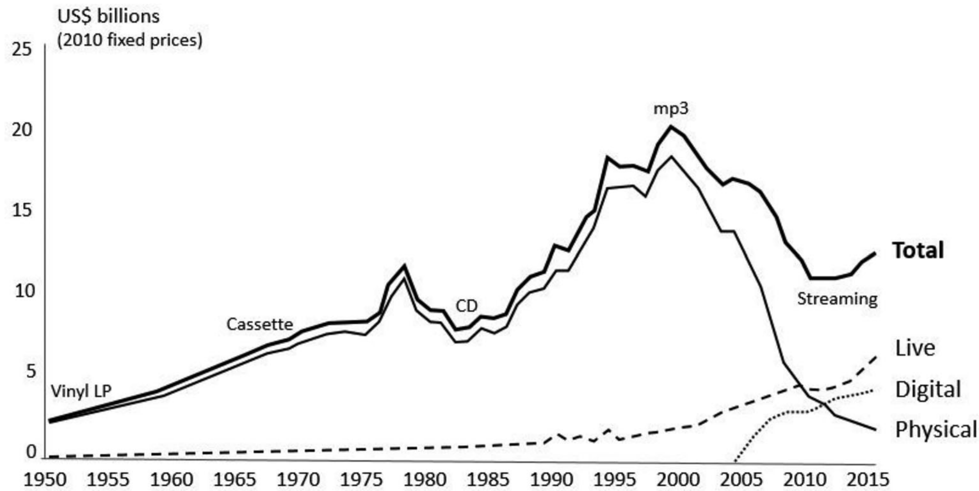

Figure 1. Revenues of the US music industries between 1950 and 2015, based on Pollstar and RIAA (Naveed, Watanabe, and Neittaanmäki 2017).

there has been a rise in the total revenues of the US music industry since 2010, due to an increase in earnings from both the digital and live music markets (Figure 1).

As seen in Figure 1, it is more accurate to describe recent developments as a shift from physical products to live performances and digital streaming. Indeed, US figures show that the latter have been the primary revenue source since 2009. According to Connolly and Krueger (2005), the vast majority of this revenue growth is generated by the top-selling artists, with pop music being an example of the *economics of superstars* (Rosen 1981). This winner-takes-all industry is characterized by the imperfection of substitutes and the application of scale economies. Others have portrayed the music business as a *blockbuster industry* (Elberse 2014), an *oligopoly* (Behr et al. 2016), and an *empire business* (Seliger 2019). Elberse has praised this blockbuster strategy as being the most successful business model for the entertainment industry, but Behr et al. and Seliger have different views. Seliger states that the live music industry, that until a few years ago consisted of regional markets, with local, national and at best continental organizers and agents, has recently become a global market that is dominated by just a few multinational corporations. He believes that artists and audiences alike should defend themselves against this empire business approach of the cultural industries in order to preserve cultural diversity in society. Here, Seliger highlights the issue that has often been debated by music industry scholars: pop music is both a global entertainment industry with a limited number of superstars and an artistic field of cultural production (Bourdieu 1993, 2010; Negus 2002). Although some academics (Cohen 1991; Negus 2009 [1996]) have described this as a conflict between commerce and creativity, Williamson and Cloonan (2007) believe that they are not mutually exclusive, but instead have a rather fluid relationship. They therefore coined the term *music industries*, instead of industry, to emphasize the plurality of the field.

A key element of Naveed, Watanabe, and Neittaanmäki's (2017) analysis of the music industries is the correlation between live music and streaming revenues. They suggest that there is significant proof of a co-evolution between these revenue sources from the 2010s onwards, which has accelerated since 2013. Streaming and live music in fact reinforce one another because: "*the resurgence in live music can largely be attributed to its assimilation of digital innovations incorporated in digital music*" (p. 4). They conclude that the live music industries have incorporated a self-propagating function and, as a result, there is proof of their sustainable development based on access and experience. They present a modelled prediction that live music will contribute up to two-thirds of the total revenues of the music industries in the next decade.

Changing live music: festivalization

Live music is growing fast in terms of size, impact and revenues. At the same time the organization of live music is changing as well. The last two decades the traditional pop music venues have seen multiple competitors enter the market. According to Kronenburg (2012), staging live music nowadays involves four types of physical space: 1) *dedicated* (purposely built and designed as a music venue); 2) *adapted* (significantly modified from previous uses, e.g., former warehouses, churches); 3) *adopted* (primarily has other functions, but is also used for music performances, e.g., stadiums, theaters); and 4) *mobile* (temporary settings based on flexible structures). The architectural distinction between dedicated and adapted spaces is less relevant within the context of this paper. As a consequence, the live music supply can be categorized as: (1) pop music venues (dedicated and adapted); (2) adopted venues; and (3) festivals (mobile spaces). Adopted venues are not considered in this research, because live music is not their main business value. Although all of these categories have been studied recently, the third has received the most attention in academic, professional, and media publications. This is a result of the recent emergence of the commercial festival industry, often referred to by the term festivalization.

The phenomenon of festivalization was coined long before the numeric explosion of festivals took place. Häußermann & Siebel were the first (according to Richards 2007 and Jakob 2013), when in 1993 they signaled the increasing importance of cultural festivals in urban identity-formation since the 1970s. Indebted to Boorstin (2012 [1961]) and Debord (1994 [1967]), they explained festivalization within a media context: "*In order to maintain audible and visible in the cries of the mass media, urban politics is concentrating on temporal and spatial aspects: festivalization as media-oriented staging of the city*" (Häußermann and Siebel 1993, 15). Scholars like Hitters (2007; cultural-programming paradigm), Richards (2010; hyperfestivity), and Jakob (2013; eventification) subsequently elaborated on this approach where festivalization is placed in the context of urban planning.

More recently, the term festivalization has increasingly been used to describe the exponential growth in the number of festivals. Although pop music festivals have been around since the late 1960s (Peterson 1973; Rutten, Oud, and Mutsaers 1991), it took several decades before this industry was institutionalized. While Frey (2000) had already registered a boom in *serious* European music festivals at the turn of the millennium, the numerical expansion of pop music versions seems to have emerged about a decade later (as already mentioned in the Introduction and portrayed in Figure 3). Figures from the Nexis Uni news database (Lexis Nexis 2019), which includes all Dutch

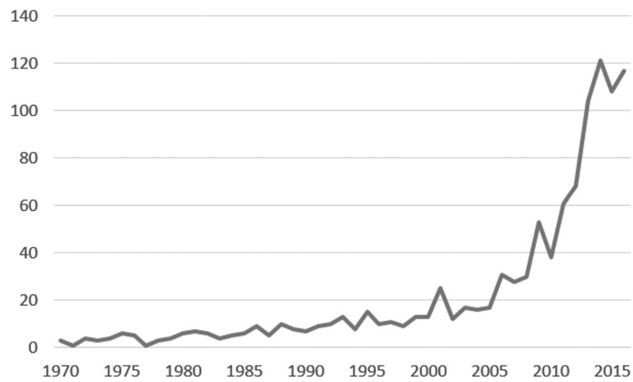

Figure 2. Annual market entry of all the Dutch music festivals that took place in 2016 (n = 1070). Source: Festivalatlas 2016 (Van Vliet 2017).

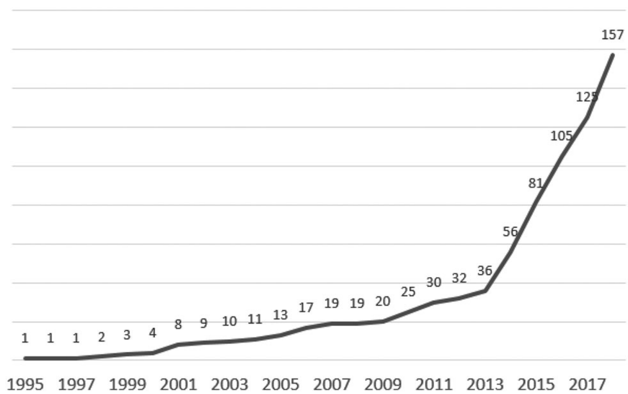

Figure 3. Cumulative use of the term festivalization (in Dutch: festivalisering) in Dutch national and local news media between 1995 and 2018. Source: Nexis Uni 2019.

national and local papers, show that the term festivalization ('festivalisering') has been used in the Dutch media since the late 1990s, and has increased in significance exponentially since 2013 (Figure 3). Most of these contributions in the media use the term festivalization to describe the rising supply of festivals in number terms, with the main focus being on the negative implications of this growth. Figures 2 and 3 show a small interruption in the trend around 2005 and a major one around 2012, proving the recent (numerical) festivalization in the Netherlands.

Négrier criticizes this purely quantitative approach to festivalization, describing it as a "deceptively simple explanation" (Négrier 2014, 7). To him, this phenomenon should be understood as an expression of larger societal developments, or as an *eventalisation* of regular, cultural offers. Festivalization is strongly influenced by *presentism* and can be explained as a result of changing consumer behavior in a liquid society (Bauman 2000; 2008; Blackshaw 2010; Richards 2010; Bouwer and van Leeuwen 2013; Négrier 2014). This idea of festivalization as a societal phenomenon has been the starting point for this paper. An integral approach was applied to understand festivalization as a phenomenon within the fast growing and changing live music industry.

Institutional change: strategic action fields

This paper aims to analyze the effects of festivalization on two key types of organization that stage pop music: venues and festivals. According to cultural sociologists, institutions in the cultural industries distinguish themselves from those in other sectors. In particular, music industry bodies are characterized as being part of a flexible and networked art world (Becker 1982), being flux mediators between artists and audiences (Hennion, as cited in Negus 2009 [1996], 60), operating within informal, often risky, contexts (Banks et al. 2000) and are even characterized as being an imaginative democracy (Hennion, as cited in Negus 2009 [1996], 61). Emphasizing the importance of the flexible, networked position of live music institutions, several scholars (e.g., Schippers and Grant 2016; Behr et al. 2016) have used a live music ecology perspective to explain these positions. Behr et al. described three key elements of the ecology approach to live music: (1) the sustainability of an integral live music culture; (2) the importance of the materiality of live music venues; and (3) the interdependence of otherwise disparate actors. The latter element has also been studied by Fligstein and McAdam (2011, 2012) in their theory of strategic action fields (SAF). They define a SAF as "*a meso-level social order where actors […] interact with knowledge of one another under a set of common understandings about the purposes of the field, the relationships in the field […] and the field's rules*". SAFs are "*socially constructed arenas within which actors with varying resource endowments vie for advantage*", based on a subjective standing instead of objective criteria and constructed on a situational basis by members of the field. This implies that there is a shared understanding of what is at stake, who is in power, what forms of action are legitimate, and the knowledge that different interpretative frames are used by different actors (Fligstein and McAdam 2012, 10–11). A key element in a SAF is the distinction between the different positions of the actors within the field, namely incumbents (those who wield disproportionate influence) and challengers (less privileged actors who have little influence over the field's operation, but recognize its nature and dominant logic). Nordgård (2016) applied this distinction to the SAF of the music industries. His focus was on major and independent labels, and he concluded that "*the differences […] may not be simply a matter of competing companies, but in many aspects […] complementary businesses, constituting different services for artists with different needs and ambitions.*" (p. 26). The notion of a SAF seems to also be applicable to the live music industry, but may, in fact, be unsuitable in some respects because the sector appears to be more complex than the suggested dichotomy of incumbents and challengers.

Conceptual approach

The multi-layered approach of this study is emphasized by the use of a conceptual framework that integrates the levels of: 1) the music industries in general (in which live music is dominant in current revenue streams); 2) the live music industry in particular (with its festivalization); and 3) the institutions that operate in relatively flexible, networked fields (SAFs). This multi-level approach has been processed as a conceptual

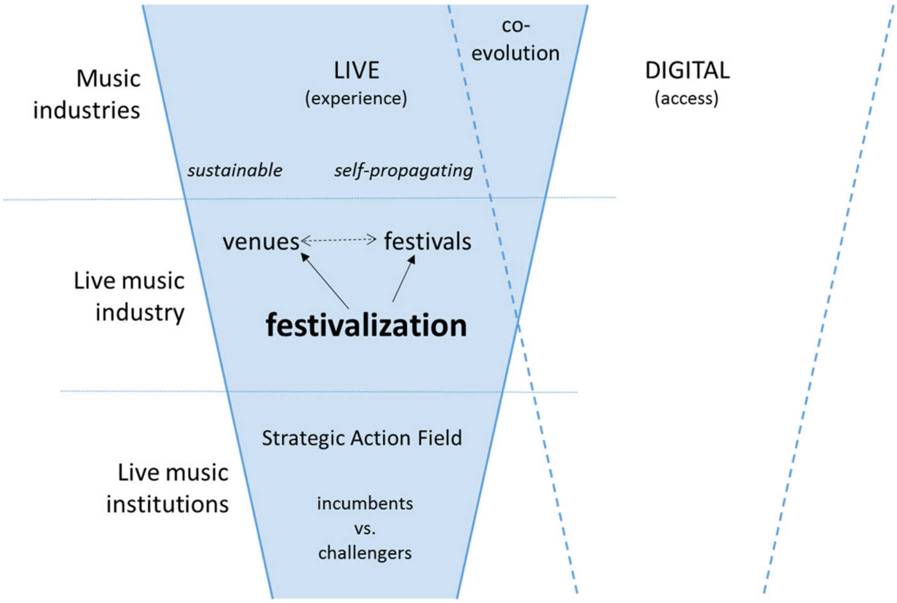

Figure 4. Conceptual framework.

model that is used as a framework for the empirical study (Figure 4). This framework contributes to the two goals of this research: positioning festivalization within the context of the changing music industries and analyzing its effects on the SAF of live music institutions.

Methodology

This empirical research analyzes how the concept of festivalization and its effects are perceived by key players in the industry in the Netherlands, namely those staging live music events. In particular, semi-structured, in-depth interviews have been conducted with directors of pop venues and pop festivals located/held in Dutch cities in an attempt to uncover the impact that the changing live music market has on the different types of events. The goal of the interviews was to extract relevant themes concerning festivalization and its effects on (institutions within) the live music industry and in relation to the conceptual framework. Epistemologically, the interviews were conducted using an essentialist approach in order to "*theorize motivations, experience and meaning in a straightforward way*" (Braun and Clarke 2006, 85).

All the respondents had the role of general director or artistic director of their particular business. The interviewees were selected using maximum variation and purposeful random sampling strategies (Palinkas et al. 2015). Maximum variation was achieved by choosing directors from eight different cities in the Netherlands and from both brick-and-mortar venues and festivals: six respondents were in charge of a (dedicated) built pop music venue, five were directors of a pop music festival, and three were in charge of both a pop venue and one or more (semi-) independently-operating festivals. The respondents were also chosen based on variations in the size of a venue or festival. Finally, at the time of the interviews, all the directors had

	Small (s)	Mid-size (m)	Large (l)
Festival (F)	≤ 3000[a]	3001 - 9999	≥ 10000
Venue (V)[b]	≤ 400	401 - 999	≥ 1000

a: based on the lower limit used in Fonds Podiumkunsten (2019) & Respons Market Research (2019).
b: based on the grouping used by EM Cultuur (2019).

Figure 5. Categorization of the respondents.

been in their role for at least five years, ensuring that they had experienced the effects of recent developments in the live music industry. Purposeful random sampling was used within this framework to select the specific respondents (Palinkas et al. 2015). The number of interviews held was determined by data saturation, which is defined as "*the degree to which new data repeat what was expressed in previous data*" (Saunders et al. 2018). In this study, very little new data were added to the empirical dataset after the 13th interview. A 14th interview was, however, conducted to ensure that the saturation point had been achieved and there was sufficient conceptual depth (Saunders et al. 2018). The interviews were conducted on an anonymous basis, which enabled the participants to talk freely about sensitive issues such as market competition. All of those who were asked to take part in the research agreed to do so, and there were no rejections. The interviews were held between November 2018 and January 2019 at a respondent's office or a location close to it. The interviews were structured by a fixed set of themes related to the conceptual framework and lasted between 60 and 120 minutes. They were all recorded and transcribed verbatim. For anonymity reasons, the respondents were coded using three characters (e.g., 'Fm5'): the first represents the main business unit ('F' or 'V' for festival or venue); the second the unit's size ('s', 'm' or 'l' for small, mid-size or large - see Figure 5); and the third a number chosen at random (1-8) to identify the city where the stage is located. The number of large venues in the sample is relatively high because the comparatively small amount of such venues in the Netherlands is overrepresented in cities and the focus of this research is on urban live music in particular.

A thematic analysis was applied to the empirical data. This type of analysis best fits the goals of this research because, according to Braun and Clarke (2006, 97), it has the advantages that it "*can usefully summarize key features of a large body of data, and/or offer a 'thick description' of the data set, can highlight similarities and differences across the data set and can generate unanticipated insights.*" A hybrid investigation was performed to accurately identify relevant themes in the dataset and uncover unanticipated insights. This involved conducting "*a deductive thematic analysis while allowing for themes to emerge direct form the data using inductive coding*" (Fereday and Muir-Cochrane 2006, 83). In practice, the dataset was first coded in general (initial coding). This general set of codes was then categorized within the theoretical framework, before the dataset was coded again (secondary coding) using this framework as a starting point. Finally, the different phases set out by Braun and Clarke (2006) were used to define and redefine the themes.

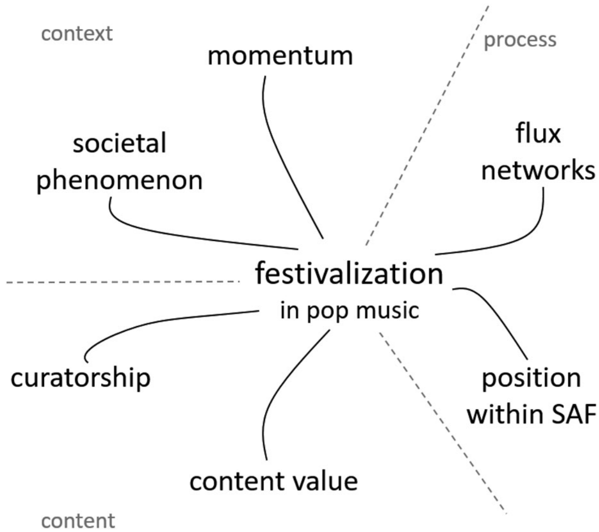

Figure 6. Extracted themes for festivalization in pop music.

Results

The thematic analysis had two initial parts: 1) an investigation of the meanings, perceptions, and experiences of festivalization inside the live music SAF; and 2) an examination of the effects of this festivalization on the SAF of live music institutions.

Festivalization in pop music

Six major themes were extracted from the data in relation to what is understood of festivalization in the music industries. These themes concerned the contexts within which festivalization has taken place, the specific content of music festivals, and the processes related to them (see, also, Pettigrew and Whipp 1993). Two distinct themes were identified within each of these dimensions (see Figure 6) and are elaborated on below.

Societal phenomenon (context)

The research data provide proof that festivalization is strongly embedded in a societal context, with the directors of both the bricks-and-mortar venues and the festivals emphasizing that it is, to them, a logical, inescapable, and irreversible development that is the perfect reflection of contemporary society. Some even hinted at the notion of a *temporal utopia*, although the term heterotopia (Foucault 2008 [1967], Quinn 2016) would be more appropriate given a festival's specific time-spatial nature. A central theme here was the collective euphoria that is attributed to music festivals. The respondents spoke about "*finding your identity in the mass*" (referring to Boomkens 1994), "*people going sync*", and about people immersing themselves in the festival experience: "*Despite the fact that most of our visitors say that they mainly come for the festival in general, they all talk about the headliners. To me, that's because of the desire* *for collective euphoric moments. Headliner artists raise the expectation that this euphoria is going to happen." (Fm6).* Others saw festival crowds as the ultimate *homo ludens* (as explained by Huizinga 2014 [1938]). One of the most-mentioned explanations of festivalization in a societal context was escapism, with the festivalscape (the experienced atmosphere within the physical festival setting, see Lee et al. 2008 and Mason and Paggiaro 2012) representing a temporary bubble away from everyday life.

Some notions concerning the importance of music festivals in society go further than ideas of play or escape. In these, festivalization is closely connected to secularization and giving meaning to one's life. Here, experiencing a festival is a form of performative or devotional leisure (Blackshaw 2010, 2018), in which individual development, meanings, and reflections are central. Visiting a festival is about personal reflection, about going to your inner-self. As one respondent stated: *"A festival is about finding your own identity. It's really focused on individual identity. (…) Going to a festival is more about 'tripping' than going to a venue is." (Vl4_b).*

Momentum (context)

Another key value of festivals is the momentum they create. In the case of a brick-and-mortar venue, this represents the performance of an artist; for a music festival, however, this momentum also embodies the complete experience. The precondition that a festival is temporary produces a sense of scarcity and urgency. This, combined with a festival's massality, creates the feeling that *'it is desperately important that you are there'*. Consequently, this momentum has a huge media value.

The power of the momentum as a combination of scarcity and massality can be seen as a manifestation of co-presence (Urry 2002). Several respondents used this notion to explain the suction effect they experience at festivals, which increasingly seem to be a magnet for businesses, knowledge-institutions, and innovation professionals. The interviewees also commented on the growing number of conferences or seminars that are part of, or related to, music festivals. Meanwhile, in addition to the appeal of festival settings, others emphasized the external spin-offs that are potentially generated: *"That fact that we started (…) the festival has had a very positive effect on the local cultural scene. Pop culture is a good connector, so we manage to cooperate with both civil society and businesses. (…) One of our festivals has developed as an innovation hub and we also cooperate on a European level. We work with businesses and knowledge- and public-institutions." (Fm6).*

Content value (content)

Several respondents had the view that the success of music festivals can be explained by their two experience values: 1) because of their scale and financial power, they are better than other types of venues at booking superstar headliners or hyped-up artists whose shows produce a high experience level; and 2) the festival setting itself (festivalscape) also has a high experience value. Both factors give festivals a strategic advantage relative to brick-and-mortar venues. *"In my experience, you go to a venue to experience live music. You visit a festival to experience the festival itself (…) it's a* *temporary village where you live together (…) within the festival experience there are live shows that you experience on top of the general experience." (Fm6).*

The fact that music festivals can book large numbers of artists at the same time is an enormous scale advantage over most other venues, and applies to artists, suppliers, sponsors, and crowds. Festivals have huge booking power and are in constant (global) competition to book headliners and hyped-up artists because these produce the most profit. In these cases, the blockbuster strategy (Elberse 2014) applies: booking bigger names leads to higher revenues and attendances and attracts more attention. This strategy clearly benefits the large-scale festivals: *"I think the mid-size venues are really suffering from that. Because they aren't able to pay the fees that festivals are willing to pay. (…) it's getting more difficult now to find interesting artists because there are more and more festivals in Europe and they are all throwing lots of money [about]." (Vl4_a).* Another respondent confirms this statement: "*Artists increasingly want to play the bigger stages, and we are lucky to have one. At the same time you see the ticket prices going up. It's just a game, the scarcity; how much tickets are there, how high can you set the price?*" (Vl7).

The research also provides proof that the Dutch live music sector is part of a superstar economy (Rosen 1981; Rutten and Smeets 1997; Connolly and Krueger 2005), where there is growing inequality between the fees paid for headliners and unknown artists because of the increasing number of (large) music festivals. The respondents claimed that it is only the bigger acts who profit from this, leading to even higher fees: *"Recent developments have especially benefited the big artists. When there are lots more festivals and you're the artist who everyone wants to see, well … (…) There are many more festivals than weekends in the summer season, so there's a lot of competition. The one that manages to book the act is the winner. (…) Market values for artists are rising much faster than they used to." (Fl8).*

Curatorship (content)

A commonly mentioned theme was the role that festivals play as music curators (e.g., Jansson and Hracs 2018), which they have (partly) taken from the brick-and-mortar pop venues. Both the venue and festival directors stated that people nowadays do not go to pop venues to discover new artists, but visit festivals instead. In this context, a connection is often made with the changing patterns of consumption in music generally: the music festival is 'Spotify-live'. This supports the co-evolution theory of Naveed, Watanabe, and Neittaanmäki (2017), i.e., the value of consuming music at a festival not only lies in experiencing the performance of a specific artist, but also in the curated combination of acts. This means that festivals are (relatively) suitable for what can be described as 'contextual programming': *"I think this is changing; you see more festivals taking on the role of curator. I think that's important. (…) These festivals operate as curators, something you can't say about most venues. (…) the audience wants to trust you on your good taste." (Fm6).* Festivals are perceived to be the best setting to *"create context for a music performance"* (*Vl4_b, Vs7, Fm7*). *"We create the line-up based on the dynamics of the music, not based on style or genre. We also work with different curators to create a diverse line-up." (Fm7*). A director of a relatively small venue states that the situation now is the opposite of what it used to be: *"I think that the venues can learn a lot from the festivals and from the most progressive clubs in the city. They focus more on context and how to book within a broader context. Nowadays, the target for most of the smaller venue bookers is selling at least 150 tickets for a show. What they do is risk avoidance. While their work should be about making artistic choices."* (Vs7).

In their role as music curators, festivals make bold choices in constructing their line-up. Indeed, their temporary nature, which gives them a combination of scale and attention, means that they are in a position to try to create tension in relation to the acts that are performing. This can be achieved by combining different genres or booking artists who would not sell enough tickets for a solo show in a permanent venue. *"The main reason why we started this festival is that we don't have the capacity and the audience to book all these artists for separate shows in our venue. Then we would have seen three people showing up each night. So, we decided to bundle it and give all these bands a fair shot to reach a good crowd." (Vs2).* The festival directors described a relatively high level of booking freedom, including because of the open-mindedness of their audiences.

The interviews revealed signs that festivals are developing ways to use their power and impact in a broader sense, with a striking example being the fact that they encourage artists to produce music exclusively for the festival or to be released at the event: *"One of the festivals we organize goes much further than just booking bands. We also organize things that people just don't expect and that exceed expectations. One of these things is that we give artists composition assignments so they create new music exclusively for the festival." (Vl1).*

Flux networks (process)

The third main element of festivalization is its distinctive structure, organization, and processes. Festivals are, at their core, fluid, flexible, and non-rigid phenomena. They are often also referred to as network-based. This means that it is relatively easy to enter the market, but festival organizers also greatly depend on other parties like bookers, suppliers, and local governments. This network-based structure means that festivals are very adaptable (or fluid, flexible). Several respondents said that they started their festival because it was a "childhood dream" (Fl4, Fs2, Fm6) or they felt a need to fill a gap that they had experienced. As a result, they found the festival market to be relatively accessible and adjustable: *"You see more and more fluid concepts. Small-scale bookers who organize their own events." (Fs2).* Meanwhile, festivals that want to grow to a mid-size level need to have a good network in the music industries generally: *"If you analyze the backstage of live music, it's an old-school capitalist industry. (…) There are two key players that control the Dutch market (…) they are the bookers for maybe 80% of the artists we want to book." (Fm6).*

The term connector or intermediary was often mentioned as part of the notion that a festival is a network. Festivals are seen as intermediaries between artists, genres, tastes, people, and ideas, as well as links between different types of art or performance.

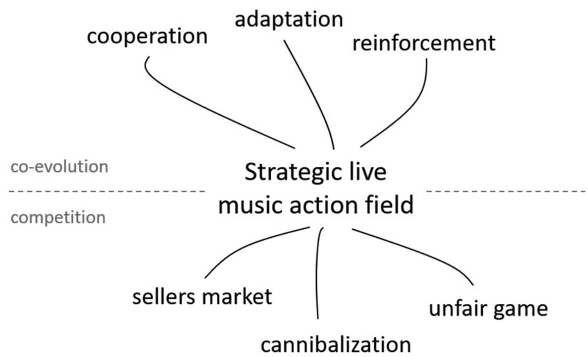

Figure 7. Extracted themes and sub-themes for the live music strategic action field.

Position within SAFs (process)

Several interviewees framed festivals within the live music industry as a whole as being at the flexible end of a *flexible* to *rigid* continuum, while placing brick-and-mortar venues at the other (rigid) end. Festivals have a stubborn image-frame of enjoying strategic advantages, or even as being less professional than dedicated bricks-and-mortar venues. The festival directors interviewed framed their business as very risky, with a commonly mentioned theme being the tactical and strategic relationship between festivals and other venues. Both the venue and festival owners stated that they bolster one another in particular ways, although the growth of the festival supply has led to more competition, especially with respect to artists. Several respondents saw festivals as having a deliberate strategy whereby the organizer aims to book one or a small number of blockbuster acts to sell their tickets and will then fill the bill with much cheaper artists: *"To strengthen our competitive identity, we started organizing festivals. And also because we earn money with them. I can create a mix of one or two of the headliners who attract enough people to these festivals; I'm willing to pay for that. And then there's a whole bunch of other artists around who don't get paid a lot but make it more attractive overall." (VI5)*. Other respondents mentioned that artists increasingly choose to tactically *underplay* a brick-and-mortar venue (they deliberately decide to play a venue that is too small, so the show will sell out immediately), as a way to attract the attention of both organizers and audiences in time for the festival season. Others noted that artists are increasingly deciding to do a festival tour first and then use the attention they get to plan a club tour after the festival season.

The effects of festivalization on live music's strategic action field

The research data revealed two central themes concerning the effects of the growing significance of festivals on the Dutch live music industry: co-evolution and competition. They are both now elaborated on in relation to three underlying premises, as shown in Figure 7.

Co-evolution: cooperation

The notion of the existence of co-evolution between brick-and-mortar venues and festivals is widely supported within the Dutch live music industry. The respondents in this study described valuable forms of cooperation between permanent and temporary music stages, mainly because a bigger supply will generally attract more attention and larger crowds, creating a better and more professional live music scene. The most common form of cooperation described was coproduction: *"We cooperate with several other suppliers, based on the fact that we do the artists and tickets and they do the production and food & beverage." (Vl5)*. Coproduction takes place both at festivals that are held inside a music venue's building and those that take place outside. Venues and festivals both seem to take the initiative. Related forms of coproduction mentioned by the venue directors were the organization of side-events or after-parties for a festival, or being responsible for a specific stage there: *"We cooperate closely with the main pop festivals in town. With one of them, we share our booker and we organize the after-party for another festival." (Vs2).*

A more organizational form of cooperation described consists of local or regional concepts in which several venues and festivals work together to strengthen the local/regional live music ecology (Van der Hoeven and Hitters 2019). In this way, they cooperate by booking the same (predominantly new, talented) artists in sequence or create a brand that consists of the participating venues and festivals: *"A couple of years ago, we initiated a regional cooperation between several venues. The main focus is talent development because we thought there was a need for that. We got a lot of funding for that project and now it's a lot more institutionalized." (Vm3).*

Co-evolution: adaptation

The interviews provided proof of high levels of adaptation and adoption between pop venues and festivals. During a process of professionalization, the latter seem to take over elements from the brick-and-mortar venues, with attempts made to copy the physical and audio-visual assets of permanent stages by replacing festival tents with more professional temporary structures and trying to achieve the acoustic qualities of the pop venues. More proof of such adaptation is also seen in the way that brick-and-mortar venues seem to copy, adapt, and adopt several aspects of the successful pop festival industry. In particular, venues try to alter their physical environment based on festival settings, with some respondents stating that festivals inspire them in relation to the architecture of their building, its setting and atmosphere (the festivalscape), the ways they create their program (e.g., contextual); the kinds of artists they book; and their marketing and branding. A mid-size venue owner stated: *"This festivalization has certainly had an impact on our venue. We have to make sure the experience in this building is more than just entering a place and watching a band. Most venues are just black boxes, but they should be places that astonish you. Now we're creating a better experience." (Vm3).*

Co-evolution: reinforcement

Reinforcement was a third co-evolution theme that could be distilled from the data. The difference between the first two themes, cooperation and adaptation, and reinforcement is that the latter concerns the strategic business advantages that venues and festivals achieve because of their co-existence. Initial proof of this is found in the hybrid organizations that have developed in several cities, where there are live music brands that own both venues and festivals, brick-and-mortar venues that are (re)built as indoor festival locations, and city-programming initiatives in which the urban environment and its appeal is the central element, rather than a specific venue or festival. As the director of a smaller venue explained: "*Our venue was the initiator of festival [X], which is now the most popular pop festival in town. Also several other initiatives originate from this venue.*" (Vs6). For one of the larger venues, initiating a festival was intended as a strategic business operation from the start: *"A couple of years ago, we decided to initiate a new festival as a [type of] strategic business development. We didn't manage to book enough artists in this specific genre at our venue, but with the festival we've created the momentum and power to do so. Because the festival is successful, we're better able to book these kinds of artists at the venue as well." (Vl1).*

Another element of reinforcement in live music lies in the mutual dependence between venues and festivals. Indeed, the two seem to be interwoven in several cities and a large number of executives stated that they could not exist without each other. This supports the idea of a local music ecology approach (Behr et al. 2016; Van der Hoeven and Hitters 2019).

Competition: sellers' market

Competition between venues and festivals is predominantly about artists, according to the respondents. The higher number of pop music stages are all competing for the same headliner acts. Indeed, even though the value of festivals partly lies in the overall experience, the interviewees emphasized that the line-up is still the most important factor when it comes to selling tickets. Festivals have more booking power than other venues and are in a position to raise the sums needed to sign up the most popular acts. This has benefited the negotiating position of the artists and, as a consequence, the market increasingly favors the sellers. One respondent even stated that his event "*for 95% depends on what we're offered, who's touring at the time of our festival." (Fm6).* This market is also becoming increasingly global, with the main competitors located in other parts of the world. Several venue owners shared their concerns about this: *"In another business, you'd just produce more when the demand increases, but in live music that's impossible. We're just brokers in an extreme sellers' market." (Vl1); "To be honest, I'm not sure if we'll manage to keep the festival going. (…) Headliners are just unaffordable." (Vl4_b).* This development is strengthened by changes in the general music industries, where globalization and online streaming have resulted in the immediate worldwide release of new music, whereas previously artists used to link a release date for a certain country to their touring schedule.

As a consequence of this escalating struggle to sign a limited number of artists, claiming exclusivity has become a proven strategy in live music (e.g., Hiller 2014). Although most of the respondents said that they do not enforce exclusivity in their contracts, this theme was frequently mentioned as one of the main future threats. This frustrated some interviewees: *"Even with these smaller acts you see exclusivity deals. It makes you think: bugger off! It's annoying. It really bothers me. I think it's absurd and antisocial (…) The only thing I can do is advise people not to go with it." (Vs2).*

Competition: cannibalization

A second theme within the context of competition is cannibalization. The respondents described this with respect to artists, with a large number of festival directors emphasizing that their summer season now stretches from May to September. This extended season makes it extremely difficult for the brick-and-mortar venues to book artists. Cannibalization in relation to crowds was also highlighted: in an increasingly saturated market, there is tough competition for an audience that has limited time and money. Some venue owners even accused festivals of stealing their spectators. Cannibalization of partners was a third, frequently mentioned theme, with the rapidly growing live music industry increasing the competition for funders, civil society, and other partners. As referred to previously, festivals in particular have a suction effect on potential partners: *"Festivals work like a magnet for these bands. They prefer playing festivals instead of what we call 'a second round' at the club venues. That almost doesn't happen anymore." (VI4_a).*

Competition: an unfair game

Finally, the respondents stated that the competition between pop venues and festivals is unfair. Their main argument concerned the Dutch funding system, whereby most brick-and-mortar venues are subsidized by the local and/or national government. This decommodification (see, e.g., Beech 2015) leads to unfair competition, according to several respondents, such as this festival organizer: *"Festivals have to bear their own weight, but pop venues have been funded to pieces because every single average town wanted to have its own pop venue. And once they're open, nobody shows up." (FI4).* There are several reasons for this perceived unfairness. First, there is not (yet) a similar funding structure for pop festivals and, as several respondents claimed, the structures that do exist are unclear. Some said that the funding is not being used for its intended purpose, although several venue owners claimed that their need to maintain a building means that the competition with the fluid and flexible festivals is unfair, despite the funding they receive.

Another element of unfairness referred to concerned the different sizes of brick-and-mortar venues and festivals, which are in a competition for more or less the same artists and audiences. However, because festivals are experiences with an enormous scale advantage, they are able to sell many more tickets, giving them greater booking power. This also means that they can provide a platform for unknown acts. This is not the case for other types of venues, which do not generally sell enough tickets for events featuring these kinds of artists.

Conclusion and discussion

Along with the increased popularity of live music in general, its organization and spatial context have also changed. Pop music festivals have been around in the Netherlands since the late 1960s. There has, however, been an exponential growth of the festival industry since 2010, which has had an impact on the SAF of live music in the country. These effects have been analyzed in this paper by explaining festivalization from the perspective of the SAF of the live music industry and mapping its implications for this sector.

Festivalization in pop music

In popular debates, the concept of festivalization is predominantly used to indicate and criticize the rapid growth in the number of (music) festivals being held since around 2005, and particularly after 2010. However, there is more to festivalization than just a growth in numbers. Our analysis indicates that key players in the live music industry have a different perception of festivalization and perceive this growth as an inevitable reflection of contemporary society. Directors of venues and festivals alike emphasized the significant value creation produced by festivals, which the respondents believe have a dual experience value that is created by: 1) enabling their audiences to feel a limited, but real-time, sense of collective euphoria at the show of a (superstar) headliner; and 2) offering an immersive festivalscape that cannot be matched by brick-and-mortar venues. Our analysis goes beyond Négrier's (2014) notion of festivalization as an eventalization of regular, cultural offers in a liquid society and also beyond the idea of festivalization as phenomenon purely related to urban development and citymarketing. We argue that festivalization needs to be understood as a multi-layered concept, indicating simultaneous value creation for consumers, artists, cities, local economies and, not least, the live music SAF itself. The ephemeral nature of festivals creates momentum and responds to consumer's need for unique experiences, escapism, and devotional or performative leisure. Festivals create value for both big and famous artists (because of their booking power) and emerging artists (because of their scale and the momentum they create). They create value for local (urban) economies because of the suction effect they have and the flux networks in which they operate (that also include brick-and-mortar venues). In practice, festivalization has become an integral part of the business strategy of a large number of music venues.

Co-evolution or competition?

In combination with a more or less stable number of venues, the rapid recent growth of music festivals in the Netherlands has undoubtedly increased competition within the live music SAF. At its core, live music is an interactive experience between the artist and the audience - and the battle for both has intensified. Yet the public demand seems to be abundant, while the number of (popular) artists is limited, mainly because of the imperfection of substitutes. The fact that the pop music industry is a typical superstar economy has increased the competition for the top-bill acts. In general, festivals are better able to apply these kind of blockbuster strategies, which gives them a strategic advantage in relation to traditional venues. Our findings show that the perceived competition predominantly takes place at the level of the artists (superstars) and their agents, emerging global markets, and local and national governments and their policies. In this contested field, both parties accuse the other of unfair competition: venues claim that festivals have strategic advantages, such as their scale and fluidity, while festivals assert that venues are partly decommodified because the kind of funding these venues receive is unavailable to them. Another practice which hinders competition are exclusivity deals, which exclude acts from the market.

Along with this increased competition, there is nevertheless proof that there is co-evolution between festivals and brick-and-mortar venues. Dedicated music venues are increasingly becoming brands instead of buildings; they are hybrid live music organizations that are expanding to other (music or not) buildings, arranging their own festivals, and/or cooperating with other parties in a city. Indeed, there are many examples where venues and festivals cooperate by producing and/or organizing live music together using their mutual strengths. This also results in the emergence of local or regional live music concepts, with the aims being talent development and attracting bigger audiences. Another common practice is the mutual adaptation of elements and assets by venues and festivals. Instances of this are found in the fields of architecture, (experience) design, acoustics, programming, marketing, branding, and strategy. Festivals attempt to copy the high level of sound and acoustics that is common to brick-and-mortar venues and venues are increasingly inspired by the experience design and programming of festivals. Overall, when it comes to the effects of festivalization on the live music SAF, it is clear that the most important impact is co-evolution, and not the perceived and anticipated increased competition.

Discussion: SAFs, festivalization, and co-evolution?

The notion that SAFs can be seen as Russian dolls (Fligstein and McAdam 2011) is also applicable to the music industries. As a whole, these industries can be seen as a SAF in which, until recently, the record companies were the incumbents and the challengers the download websites, streaming services, and live music organizers. Yet there is a further doll/SAF, the live music industry, in which the brick-and-mortar venues (with their long experience, dedicated buildings, funding structure, and professional organizations) can be seen as the incumbents and the festivals (with their, often, small organizations, short history, and fluid nature) as the challengers. Yet this notion is debatable for four main reasons: 1) the dichotomy of incumbents and challengers is inapplicable to the complex reality of the live music field, in which record companies, streaming services, artists, agents, venues, and festivals are, to a certain extent, interwoven; 2) it is difficult to see the music industries as a SAF because they seem to consist of different fields: one field is a global entertainment industry with a limited number of superstars and the other is an artistic field of cultural production. In this context, Hesmondhalgh (2006) distinguishes the field of mass cultural production from the field of restricted cultural production; 3) it is difficult to see the live music industry as a SAF because this industry is highly dependent on external players such as artists, their agents and local policy makers. Fligstein & McAdam already signaled this difficulty by stating that "*field membership consists of those […] who routinely take each other into account in their actions. This excludes from membership [those who] may be very important to the everyday functioning of the strategic action field*" (Fligstein and McAdam 2011, 167–168); 4). In the definition by Fligstein & McAdam, incumbents are characterized by their wielding of disproportionate influence (power) within their field and their dominance of its culture and organization. This research has, however, provided evidence that it is in fact the festivals that have put themselves in power with their multiple experience values, scale advantages, and flexible nature. Moreover, the festival industry seems to increasingly dominate the culture and organization of the live music SAF: its temporary nature, experimental values, booking strategies, and networked organizations seem to be the new standard. Meanwhile, many brick-and-mortar venues find themselves in difficulty. Some even seem to be locked up in their own castles, in that their state-of-the-art buildings are more of a hindrance than a strategic advantage. Indeed, they are so focused on ensuring the financing of their operations that they increasingly have to leave to the festivals matters like curatorship, talent development, and offering a meeting place for youth culture.

This paper contributes to the academic debate about festivalization by approaching it from inside the SAF of live music and placing it within the rapidly changing music industries. It adds valuable insights to the existing notions of festivalization as a one-dimensional growth in numbers or an instrument for external goals such as urban development, community building or marketing. Music festivals can be seen as a tool for multiple value creation at the levels of society, the music industries, and the live music sectors and their institutions. Furthermore, this research provides proof that the Dutch live music industry is a complex and rapidly changing SAF. This means that the dedicated music venues face major challenges, which they seem to be approaching boldly. Nevertheless, even though these venues are mostly willing to change and adapt, the mid-size and smaller sites in particular could become victim to these rapid changes, as most lack the financial resources, flexibility, and supply needed to keep up with the new dominant culture and structure within the field. Further research could explore the business strategies of these mid-size and smaller venues and the funding structures for live music on a national and local level. Other fruitful avenues of research would include the effects of festivalization beyond the live music action field itself, but on proximate fields such as the cultural and creative sector or the wider (urban) environment. Festivalization is a societal phenomenon intertwined with changing consumer habits, social practices, emergent markets and developing government policies and thus warrants careful examination of its causes and consequences.

Disclosure statement

No potential conflict of interest was reported by the authors.

Funding

This work was supported as part of the project Staging Popular Music: Researching Sustainable Live Music Ecologies for Artists, Music Venues and Cities (POPLIVE) by the Dutch Research Council and the Taskforce for Applied Research (NRPO-SIA) [grant number 314-99-202, research programme Smart Culture - Arts and Culture]. Partners in this project are Mojo Concerts and The Association of Dutch Pop Music Venues and Festivals (VNPF).

ORCID

Martijn Mulder http://orcid.org/0000-0002-3749-752X

References

Banks, M., A. Lovatt, J. O'Connor, and C. Raffo. 2000. "Risk and Trust in the Cultural Industries." *Geoforum* 31 (4): 453–464. doi:10.1016/S0016-7185(00)00008-7.

Bauman, Z. 2000. *Liquid Modernity*. Cambridge, UK: Polity Press; Blackwell.

Bauman, Z. 2008. *The Art of Life*. Cambridge, UK: Polity Press.

Becker, H. S. 1982. *Art Worlds*. Berkeley: University of California Press.

Beech, D. 2015. "Incomplete Decommodification: Art, State Subsidy and Welfare Economics." *Parse Journal* (2): 15–27.

Behr, A., M. Brennan, M. Cloonan, S. Frith, and E. Webster. 2016. "Live Concert Performance: An Ecological Approach." *Rock Music Studies* 3 (1): 5–23. doi:10.1080/19401159.2015.1125633.

Bennett, A., Taylor, J., and Woodward, I., eds. 2014. *The Festivalization of Culture*. Burlington, VT: Ashgate.

Blackshaw, T. 2010. *Leisure*. London: Routledge.

Blackshaw, T. 2018. *Re-Imagining Leisure Studies*. Abingdon: Routledge.

Boomkens, R. 1994. *Kritische Massa: Over Massa, Moderne Ervaring en Popcultuur*. Amsterdam: Van Gennep.

Boorstin, D. J. 2012 [1961]. *The Image: A Guide to Pseudo-Events in America*. 50th Anniversary ed. New York: Vintage Books, a division of Random House, Inc.

Bourdieu, P. 1993. *The Field of Cultural Production. Essays on Art and Literature*. New York: Columbia University Press.

Bourdieu, P. 2010 [1984]. *Distinction: A Social Critique of the Judgement of Taste*. London: Routledge.

Bouwer, J., and M. van Leeuwen. 2013. "The Meaning of Liquid Leisure." In *The Routledge Handbook of Leisure Studies*, edited by T. Blackshaw, 587–596. London: Routledge.

Bowen, H., and M. Daniels. 2005. "Does the Music Matter? Motivations for Attending a Music Festival." *Event Management* 9 (3): 155–164. doi:10.3727/152599505774791149.

Braun, V., and V. Clarke. 2006. "Using Thematic Analysis in Psychology." *Qualitative Research in Psychology* 3 (2): 77–101. doi:10.1191/1478088706qp063oa.

Brown, S. C., and D. Knox. 2017. "Why Go to Pop Concerts? The Motivations behind Live Music Attendance." *Musicae Scientiae* 21 (3): 233–249. doi:10.1177/1029864916650719.

Cohen, S. 1991. *Rock Culture in Liverpool: Popular Music in the Making*. Oxford: Oxford University Press.

Connolly, M., and A. B. Krueger. 2005. *Rockonomics: The economics of popular music (Nber working paper series, no. 11282)*. Cambridge, MA: National Bureau of Economic Research.

Crossley, N., and R. Emms. 2016. "Mapping the Musical Universe: A Blockmodel of UK Music Festivals, 2011–2013." *Methodological Innovations* 9: 205979911663066. doi:10.1177/2059799116630663.

Debord, G. 1994 [1967]. *The Society of the Spectacle*. New York: Zone Books.

Elberse, A. 2014. *Blockbusters Why Big Hits - and Big Risks - Are the Future of the Entertainment Business*. London: Faber & Faber.

EM Cultuur. 2019. *Podium Overzicht 2019*. https://www.em-cultuur.nl/podium-overzicht-2019/

EY. 2014. Creating Growth - Measuring Cultural and Creative Markets in the EU. https://www.ey.com/Publication/vwLUAssets/Measuring_cultural_and_creative_markets_in_the_EU/%24FILE/Creating-Growth.pdf

Fereday, J., and E. Muir-Cochrane. 2006. "Demonstrating Rigor Using Thematic Analysis: A Hybrid Approach of Inductive and Deductive Coding and Theme Development." *International Journal of Qualitative Methods* 5 (1): 80–92. doi:10.1177/160940690600500107.

Fligstein, N., and D. McAdam. 2011. "Toward a General Theory of Strategic Action Fields." *Sociological Theory* 29 (1): 1–26. doi:10.1111/j.1467-9558.2010.01385.x.

Fligstein, N., and D. McAdam. 2012. *A Theory of Fields*. New York: Oxford University Press.

Fonds Podiumkunsten. 2019. Programmering Festival Popmuziek. https://fondspodiumkunsten.nl/nl/subsidies/programmeringsregeling_voor_podia_en_festivals/programmering_festival_popmuziek/

Foucault, M. 2008 [1967]. "Of Other Spaces." In *Heterotopia and the City: Public Space in a Postcivil Society*, edited by M. Dehaene and L. de Cauter, 13–30. Abingdon: Routledge.

Frey, B. S. 2000. "The Rise and Fall of Festivals - Reflections on the Salzburg Festival." *SSRN Electronic Journal*. 10.2139/ssrn.236016.

Frith, S. 2007. *Taking Popular Music Seriously: Selected Essays*. Aldershot: Ashgate.

Häußermann, H., and W. Siebel. 1993. "Die Politik der Festivalisierung und die Festivalisierung der Politik. Groβe Ereichnisse in der Stadtpolitik." In *Festivalisierung Der Stadtpolitik: Stadtentwicklung Durch Große Projekte*, edited by H. Häußermann, W. Siebel, and D. Birklhuber, 7–31. Wiesbaden: Springer Fachmedien GmbH.

Hesmondhalgh, D. 2006. "Bourdieu, the Media and Cultural Production." *Media, Culture & Society* 28 (2): 211–231. doi:10.1177/0163443706061682.

Hiller, R. S. 2014. "Exclusive Dealing and Its Effects: The Impact of Large Music Festivals on Local Music Venues." *Review of Industrial Organization* 45 (2): 153–175. doi:10.1007/s11151-014-9428-x.

Hitters, E. 2007. "Porto and Rotterdam as European Capitals of Culture: Toward the Festivalization of Urban Cultural Policy." In *Cultural Tourism: Global and Local Perspectives*, edited by G. Richards, 281–301. New York: The Haworth Press.

Holt, F. 2010. "The Economy of Live Music in the Digital Age." *European Journal of Cultural Studies* 13 (2): 243–261. doi:10.1177/1367549409352277.

Huizinga, J. 2014 [1938]. "Homo Ludens: A Study of the Play-Element in Culture." http://search.ebscohost.com/login.aspx?direct=true&scope=site&db=nlebk&db=nlabk&AN=715800

IJdens, T., S. Von der Fuhr, and J. P. G. De Rooij. 2008. *Pop, wat levert het op? Onderzoek naar de inkomsten van popmusici in Nederland*. Tilburg: IVA Beleidsonderzoek en advies.

Jakob, D. 2013. "The Eventification of Place: Urban Development and Experience Consumption in Berlin and New York City." *European Urban and Regional Studies* 20 (4): 447–459. doi:10.1177/0969776412459860.

Jansson, J., and B. J. Hracs. 2018. "Conceptualizing Curation in the Age of Abundance: The Case of Recorded Music." *Environment and Planning A: Economy and Space* 50 (8): 1602–1625. doi:10.1177/0308518X18777497.

Kronenburg, R. 2012. *Live Architecture: popular Music Venues, Stages, and Arenas*. 1st ed. London: Routledge.

Krueger, A. B. 2019. *Rockonomics: A Backstage Tour of What the Music Industry Can Teach us about Economics and Life*. 1st ed. New York: Currency.

Lee, Y.-K., C.-K. Lee, S.-K. Lee, and B. J. Babin. 2008. "Festivalscapes and Patrons' Emotions, Satisfaction, and Loyalty." *Journal of Business Research* 61 (1): 56–64. doi:10.1016/j.jbusres.2006.05.009.

Leenders, M. A. A. M., J. van Telgen, G. Gemser, and R. Van der Wurff. 2005. "Success in the Dutch Music Festival Market: The Role of Format and Content." *International Journal on Media Management* 7 (3–4): 148–157. doi:10.1080/14241277.2005.9669431.

Lexis Nexis. 2019. "Nexis Uni (Query: "Festivalisering" 1995–2018)." https://advance-lexis-com.ezproxy.hro.nl

Live Nation. 2020. "Live Nation Entertainment Reports Fourth Quarter & Full Year 2019 Results." *Livenationentertainment.Com*, February 27. https://www.livenationentertainment.com/2020/02/live-nation-entertainment-reports-fourth-quarter-full-year-2019-results/

Mason, M. C., and A. Paggiaro. 2012. "Investigating the Role of Festivalscape in Culinary Tourism: The Case of Food and Wine Events." *Tourism Management* 33 (6): 1329–1336. doi:10.1016/j.tourman.2011.12.016.

Mortimer, J. H., C. Nosko, and A. Sorensen. 2012. "Supply Responses to Digital Distribution: Recorded Music and Live Performances." *Information Economics and Policy* 24 (1): 3–14. doi:10.1016/j.infoecopol.2012.01.007.

Naveed, K., C. Watanabe, and P. Neittaanmäki. 2017. "Co-Evolution between Streaming and Live Music Leads a Way to the Sustainable Growth of Music Industry – Lessons from the US Experiences." *Technology in Society* 50: 1–19. doi:10.1016/j.techsoc.2017.03.005.

Négrier, E. 2014. “Festivalisation: Patterns and Limits.” In *Festivals in Focus. Edited Collection of Essays in Tribute to Dragan Klaic*, edited by C. Maughan. Budapest: The Budapest Cultural Observatory. pp. 18–27.

Negus, K. 2002. “The Work of Cultural Intermediaries and the Enduring Distance between Production and Consumption.” *Cultural Studies* 16 (4): 501–515. doi:10.1080/09502380210139089.

Negus, K. 2009 [1996]. *Popular Music in Theory: An Introduction* (Reprinted). Cambridge: Polity Press.

Nordgård, D. 2016. “Determining Factors on Digital Change in the Music Industries a Qualitative Analysis of the Kristiansand Roundtable Conferences.” Dissertation, University of Agder.

Oakes, S., and G. Warnaby. 2011. “Conceptualizing the Management and Consumption of Live Music in Urban Space.” *Marketing Theory* 11 (4): 405–418. doi:10.1177/1470593111418798.

Orosa Paleo, I., and N. Wijnberg. 2006. “Classification of Popular Music Festivals: A Typology of Festivals and an Inquiry into Their Role in the Construction of Music Genres.” *International Journal of Arts Management* 8 (2): 50–61.

Palinkas, L. A., S. M. Horwitz, C. A. Green, J. P. Wisdom, N. Duan, and K. Hoagwood. 2015. “Purposeful Sampling for Qualitative Data Collection and Analysis in Mixed Method Implementation Research.” *Administration and Policy in Mental Health* 42 (5): 533–544. doi:10.1007/s10488-013-0528-y.

Peterson, R. A. 1973. “The Unnatural History of Rock Festivals: An Instance of Media Facilitation.” *Popular Music and Society* 2 (2): 97–123. doi:10.1080/03007767308591005.

Pettigrew, A. M., and R. Whipp. 1993. *Managing Change for Competitive Success*. Oxford, UK: B. Blackwell.

Quinn, B. 2016. *Linking Social Capital, Cultural Capital and Heterotopia at the Folk Festival*. Dublin, Ireland: Dublin Institute of Technology. 10.21427/d7bp6g.

Respons Market Research. 2019. “Festival Database.” https://respons.nl/producten/databases/#1528886881295-6507682b-331c

Richards, G. 2007. “The Festivalization of Society or the Socialization of Festivals? The Case of Catalunya.” In G. Richards (Ed.), *Cultural Tourism. Global and Local Perspectives*, 257–280. Binghamton, NY: Haworth.

Richards, G. 2010. *Leisure in the Network Society: From Pseudo-Events to Hyperfestivity?* Tilburg: Tilburg University.

Rosen, S. 1981. “The Economics of Superstars.” *The American Economic Review* 71 (5): 845–858.

Rutten, P., G. J. Oud, and L. Mutsaers. 1991. *Nederlandse popmuziek op de binnen- en buitenlandse markt: een onderzoek naar de positie van Nederlandse popmuziek op de binnen- en buitenlandse markt voor geluidsdragers en concerten*. Rijswijk: Ministerie van Welzijn, Volksgezondheid en Cultuur, Directoraat-Generaal Culturele Zaken; Distributiecentrum, DOP.

Rutten, P., and I. Smeets. 1997. *Entertainmentindustrie: Lijnen naar de toekomst. Een verkenning van de toekomst van de entertainmentindustrie (No. STB-97-57)*. Apeldoorn: TNO.

Saunders, Benjamin, Julius Sim, Tom Kingstone, Shula Baker, Jackie Waterfield, Bernadette Bartlam, Heather Burroughs, and Clare Jinks. 2018. “Saturation in Qualitative Research: exploring Its Conceptualization and Operationalization.” *Quality & Quantity* 52 (4): 1893–1907. doi:10.1007/s11135-017-0574-8.

Schippers, H., & Grant, C. (Eds.). 2016. *Sustainable Futures for Music Cultures: An Ecological Perspective*. 1st ed. New York: Oxford University Press.

Seliger, B. 2019. *Vom Imperiengeschäft. Wie Grosskonzerne die kulturelle Vielfalt zerstören*. Berlin: Edition Tiamat.

Tschmuck, P. 2012. *Creativity and Innovation in the Music Industry*. Heidelberg: Springer. 10.1007/978-3-642-28430-4

UK Music. 2019. *Music by Numbers 2019*. https://www.ukmusic.org/assets/general/Music_By_Numbers_2019_Report.pdf

Urry, J. 2002. “Mobility and Proximity.” *Sociology* 36 (2): 255–274. doi:10.1177/0038038502036002002.

Van der Hoeven, A., and E. Hitters. 2019. "The Social and Cultural Values of Live Music: Sustaining Urban Live Music Ecologies." *Cities* 90: 263–271. doi:10.1016/j.cities.2019.02.015.

Van Vliet, H. 2017. *Festivalatlas 2016*. Amsterdam: MXStudio/Cross-media Research Group, Amsterdam University of Applied Sciences.

Van Vliet, H. 2019. *Festivalatlas 2018*. Amsterdam: MXStudio/Cross-media Research Group, Amsterdam University of Applied Sciences.

Waitt, G. 2008. "Urban Festivals: Geographies of Hype, Helplessness and Hope." *Geography Compass* 2 (2): 513–537. doi:10.1111/j.1749-8198.2007.00089.x.

Webster, E., and G. McKay. 2016. *From Glyndebourne to Glastonbury: The Impact of British Music Festivals*. Norwich: Arts and Humanities Research Council/University of East Anglia.

Webster, E. 2014. *Association of Independent Festivals Six-Year Report 2014*. Association of Independant Festivals website: http://aiforg.com/wp-content/uploads/AIF-Six-Year-Report-2014.pdf

Webster, E., M. Brennan, A. Behr, M. Cloonan, and J. Ansell. 2018. "Valuing Live Music: The UK Live Music Census 2017." http://uklivemusiccensus.org/wp-content/uploads/2018/03/UK-LiveMusic-Census-2017-full-report.pdf

Whiting, S. 2015. *The Economic and Cultural Value of Live Music in Australia 2014*. Ultimo, AUS: Live Music Office. https://livemusicoffice.com.au/wp-content/uploads/2015/08/LiveMusic-report-FINAL.pdf

Williamson, J., and M. Cloonan. 2007. "Rethinking the Music Industry." *Popular Music* 26 (2): 305–322. doi:10.1017/S0261143007001262.