

MUSIC FESTIVALS IN CATALONIA IN A EUROPEAN
CONTEXT. FACTORS OF COMPETITIVENESS OF A
DYNAMIC CREATIVE INDUSTRY.

by

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FESTIVALES EN CATALUÑA EN UN CONTEXTO EUROPEO. FACTORES DE COMPETITIVIDAD DE UNA INDUSTRIA CREATIVA DINÁMICA.

Este estudio pretende identificar el contexto y las características de los festivales de música en Cataluña, especialmente en un contexto geográfico más amplio, con el objetivo de evaluar hasta qué grado este modelo encaja dentro del marco europeo. Estos eventos se encuentran en una fase de crecimiento y popularidad entre el público sin precedentes, que ha sido facilitada por las nuevas tendencias turísticas, empresariales y de ocio y los ha llevado a ser los eventos culturales más populares en Europa. Son puntos clave en estrategias culturales y turísticas alrededor de Europa, dan trabajo a miles de personas y funcionan como dinamizadores económicos en las regiones donde se celebran. Este estudio analizará el contexto histórico y económico de los festivales Catalanes y Europeos, sus características y tendencias en la actualidad (estado del arte), el efecto que algunos fenómenos han tenido sobre ellos (como las tecnologías digitales, la recesión económica y el crecimiento en popularidad) y las diferencias que separan ambos ecosistemas y los hacen únicos.

Palabras clave: Festivales de música, Industrias creativas, Gestión cultural, Gestión de eventos, Eventos culturales, Tendencias de ocio, Tendencias turísticas, Macro-eventos

MUSIC FESTIVALS IN CATALONIA IN A EUROPEAN CONTEXT. FACTORS OF COMPETITIVENESS OF A DYNAMIC CREATIVE INDUSTRY.

This study aims to identify the context and features of music festivals in Catalonia, especially in a broader geographical context, in order to assess the extent to which our model fits in the European framework. These events find themselves in an unprecedented stage of growth and popularity among audiences, which has been facilitated by new tourism, business and leisure trends and has led them to become the most popular cultural events in Europe. They are key points in cultural and tourism strategies throughout Europe, employing thousands of people and working as economic stimulators in the regions where they are held. The study will analyze the historical and economic context of Catalan and European music festivals, their features and trends in the present time (state-of-the-art), the effect some phenomena have had on them (such as the arrival of digital technologies, the economic recession and their increase in popularity) and the differences that set both landscapes apart and make them unique.

Key words: Music festivals, Creative industries, Cultural management, Event management, Cultural events, Leisure trends, Tourism trends, Macro-events

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I. INTRODUCTION

The cultural industries have proved to be sectors of growing importance in the economy in recent years. The concept of "cultural industry" was first used by the theoreticians of the Frankfurt School Max Horkheimer and Theodor Adorno in 1944, who described the changes experienced at the time on the conception of culture and its form of production and distribution. The shift that began in that period towards the capitalization of culture has led us to a situation where cultural industries are a key point of the economy, representing "around 4.5% of European gross domestic product and accounting for some 3.8% of the EU workforce (8.5 million people). In addition, Europe's cultural and creative sectors have proven to be more resilient than other sectors in times of economic downturn and contribute to innovation, skills development and urban regeneration"¹, according to data from the European Commission.

Within these cultural industries we find an important example in music festivals. Since the birth of cultural industries, and with them the first contemporary music festivals, these events have shown a great adaptability to new contexts and a continuous growth, both in number and size, which have led them to be, without question, the most successful cultural events in Europe. Their relevance in Spain is even close to that of La Liga, where there is an average of 35,649 attendees per game compared to the 22,308 daily attendees that generate the 50 largest festivals in the country². Nowadays, many festivals function as economic stimulators and key points in tourism strategies, while many smaller festivals and similar projects are born on a continuous basis, generating a great supply and employing thousands of people.

As an international business student and music lover, I have always been interested in music festivals and their management, amazed by their potential in the present, the direction they are taking and the passion with which many of these projects are carried out. Although there are different definitions for the concept of music festivals, this project will focus on festivals as cultural events where a series of live music performances are presented, preferably during more than one day, which have been repeated regularly for at least two editions. This definition responds to the contemporary conception of music festivals, and it excludes other musical events such as music contests or club parties.

My main objective in this project is to identify the context and features of music festivals in Catalonia, especially in a broader geographical context, in order to find the degree to which our model fits in the European framework. For this, I consider it important to take into account the different types of festivals, as well as the environments in which they were born and exist. This is the reason why this study will cover festivals of all genres and sizes, a broad and complicated

¹ "The EU explained: Culture and audiovisual" (European Commission, 2014).

² "Más de 3 millones de espectadores en los festivales de música de 2015" (Blog Ticketea, 2016)

approach to tackle, which I hope will illustrate in a realistic way the reality of the heterogeneous Catalan festival landscape.

I intend to analyze the historical and economic context in which contemporary music festivals have arisen, from the very birth of cultural industries to the present, at both European and Catalan level. Another of my goals is to describe the characteristics of these events, identifying the different types of festivals and the many variables that describe them, in order to obtain a picture of the landscape before us.

To achieve these objectives, I will start with a study of the history of contemporary music festivals in Europe, analyzing the different stages in which these events have evolved and studying the trends that have defined their mission and format since the end of World War II, when cultural industries were born, up to the present. Later, I will focus the study on the features of European festivals according to a series of variables, such as their genre, size, age and format, with the objective of getting a global picture of the landscape and understanding the role of these events.

In the second block of the project, focused on the Catalan case, I will start by analyzing the differences presented by our landscape with respect to the European one. I will investigate the history of Catalan festivals while identifying the main features that distinguish them from the rest, taking into account several variables such as their genres, sizes, territorial distribution, financing and the effects that some events and phenomena of the recent years (such as the economic crisis, technological revolution or the increase in popularity of music festivals) have had on them.

To finish the project, I will study the specific case of three music festivals in Catalonia, with the objective of translating the features identified throughout the project into concrete examples that will help to understand the landscape in a more explicit way. In order to give a picture as close to reality as possible, I have selected three extremely different festivals to carry out this study: Porta Ferrada Festival, a medium-sized multi-style festival held in Costa Brava since 1958; Festival de Música Clàssica de Sant Fruitós de Bages, a small festival focused on classical music that presents a good example of the difficulties suffered by many Catalan festivals in recent years; and Primavera Sound, a rock/pop festival that started in 2001 that has managed to grow and expand in such short time to become the most outstanding cultural event in Catalonia.

II. METHODOLOGY

As already mentioned in the introduction, the aim of this work is to obtain a picture of the music festivals landscape in Catalonia, starting from the context and features of the European case and then focusing on the differences presented by the Catalan one.

To reach this objective, most of the project will be based on significant secondary sources that revolve around the themes of the work. The most important source of information is the book *Music Festivals, a Changing World* (2013), a unique study that set the basis after which many posterior studies have been structured, which will be referenced throughout the project. In the book, 390 international festivals were analyzed for the first time according to several variables, such as their budget, age, genre and size.

In the first chapter, focused on the history of contemporary European festivals, the most important sources (in addition to the aforementioned) will be the works *Festivals in focus* (Dragan Klaić, 2014) and *Focus on Festivals* (Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan, 2015), as well as some articles studying cultural policies and music festivals in different historical periods.

The second chapter, describing the features of European festivals, will be closely based on data provided by the aforementioned work *Music Festivals, Changing World* (2013). The project will, however, follow a very different structure, and there will also appear information from other sources, such as the Music Industry International Reports prepared by the Canadian Association for the Advancement of Music and the Arts or different articles focusing on specific aspects, such as the characteristics of festivals devoted to certain genres or the different phenomena that are affecting these events nowadays.

The third chapter, on the features of the Catalan landscape, will be mainly based on two sources: the report '*Catalunya, País de Festivals*', prepared by the Government of Catalonia in 2015 (and the update of this report that was prepared in September 2017) and the magazine '*Anuari de la Música 2017*', drafted by the Representatives, Promoters and Managers Association (ARC) of Catalonia and *Enderrock* magazine. Other data will be extracted from different official sources, such as the National Institute of Statistics (INE), Barcelona City Hall, Barcelona Provincial Council and Generalitat de Catalunya, as well as a study on music festivals carried out by the online ticketing platform Ticketea in 2016.

To conclude, the last chapter of the project, focused on the specific cases of three Catalan music festivals, will be the most diverse in sources, mainly due to the scarce information available, especially in the case of Festival de Música Clàssica de Sant Fruitós de Bages. In the study of Porta Ferrada Festival, an important source is the report published in the 66th issue of the local

cultural magazine *L'Arjau*, entitled "*El Festival de la Porta Ferrada compleix 50 edicions*", in addition to several news regarding the event. The case studying Festival de Sant Fruitós will be mainly based on other secondary sources, such as the festival's website, news and press releases (usually produced by local media) and interviews with the organizers of the event. It is much easier to find information about Primavera Sound, mainly due to its size, international reputation and average impact. Its case study will be based on several reports, such as the study of the economic impact of the festival carried out in 2014 by the consultancy Dentsu Aegis, several infographics published on the festival's official website, different news regarding the festival and information taken from interviews with the festival directors at different times. Finally, the case of the Festival de Sant Fruitós will also be based on information obtained from the festival's website, news and press releases (usually produced by local media), as well as interviews with the organizers of the event.

III. HISTORY OF THE EUROPEAN MUSIC FESTIVALS

The first problem anyone attempting to study festivals –from any approach- comes across is the difficulty to establish an adequate definition for the concept “festival” itself. This problem relates not only to the many different, difficult to unify events that use this word to describe themselves in the present, but also to the antiquity of the concept and the many origins it can be traced back to. The word ‘Festival’ has been used historically to describe events as different as a cooking contest and a religious ritual, turning it into something ambiguous and inconsistent.

To begin this chapter, in an attempt to contextualize the origin of contemporary music festivals, I will briefly introduce the different festival-like events that happened in Europe since the start of modern society, going back thousands of years and shortly studying the main features of the celebrations held during the different remarkable periods of European history.

It is difficult to separate general arts festivals from music festivals, especially in the early days, and this is the reason why much of the information to be found in this first section of the chapter will refer to festivals of any kind. Nevertheless, it is easy to observe that music has been an elemental and constant factor in these festivals since they first appeared up to the present days.

Further on in this chapter I will write about the professionalization of festivals and the first appearances of contemporary music festivals. This happened in the second half of the XX century, when a devastated Europe after the end of World War II found in festivals a tool to bring countries closer as well as a valuable product for the emerging cultural industries. This professionalization process can be separated into different emerging phases, as indicated by many authors involved in the topic.

I will follow the structure set by Dragan Klaic in the book *Festivals in focus* during most of this chapter. This structure was shortly ratified in the introduction of the publication *Focus on festivals*, another important source of information for this chapter, as well as the work *Music Festivals, a Changing World* (2013), by Emmanuel Négrier, Lluís Bonet and Michel Guérin.

An approach to the origins of European festivals up to their professionalization³

Originally, the most resembling event to a festival must have been some ancestral rituals, where people congregated in a special moment in order to honor their deities. At the start of modern society, which is normally associated with Ancient Greece, there were already events fairly similar to what we understand today for a festival. There were festivities that offered free shows,

³ Based on the work “*Festivals in Focus*” (Dragan Klaic, 2014).

normally honoring the Greek deities. We can observe that music was already an important factor in these celebrations. An interesting example can be found in the Pythian Games, in honor of Apollo, which mixed the well-known Greek athletic competitions with musical contests, at first, and later featured several competitions for art and dance. ⁴

During the Roman Empire, the religious character of the celebrations remained, although entertainment itself became more important as a tool to appease the masses and ensure their loyalty. Soon, Christianity marked the European calendar with celebrations in honor of the main figures of this religion and events explained in the new testament.

Later on, during the Middle Ages, celebrations lost some of their focus on religion and took the shape of trade fairs, usually very crowded and festive, where tradesmen had the opportunity to socialize, find pleasure and enjoy different performances. Festivals in the form of music contests were also very popular during this period, often with performances based on Christian themes.

Later, towards the 16th century, Renaissance and Baroque festivals satisfied a more elite audience, with representations that often contained mythological characters and complex analogies. During the French Revolution, "revolutionary festivals were part of the strategy of political persuasion, and they tried to teach the conceptual pillars of the revolutionary discourse. Music, hymns and bells were also part of these celebrations, as well as traditional folk festivals".⁵

During the 19th century, festivals in the form of festive groups of concerts became popular, especially in the German tradition of the Festspiele. As Dragan Klaić comments, the event that most closely relates to contemporary festivals is the Festspiele of Salzburg. This festival, held in a devastated Austria after the end of World War I, attempted to recover the Austrian status among European countries through culture. The celebration soon became a meeting point for the cultural elite and high society, until Hitler's Anschluss in 1938 forced its director and many of his companions to take refuge in exile.

It was in the following year, with the outbreak of World War II, that European festivals drastically stopped their activity, reappearing a few years later and starting to take the form of the events we know today.

The professionalization of European music festivals⁶

The professionalization and expansion of festivals is universally associated with the post-World War II period. At that time, a devastated and broken Europe was in need of reconstruction, and

⁴ "Delphi: Pythian Games" (Christin Miesfeldt, n.d)

⁵ "Los festivales de la Revolución Francesa: símbolos y sentimientos en las fiestas revolucionarias" (Sandra Beatriz Sánchez, 2008)

⁶ Based on the introduction of the work "Focus on Festivals: Contemporary European Case Studies And Perspectives" (Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan, 2015)

its countries showed a firm will to collaborate and find connections with their neighbors, in an attempt to ensure that peace would last. Solidarity between countries was reinvented, and the will to create a joint project in Europe, together with the development of an infrastructure and cultural economy across Europe –and the consequent birth of cultural industries, where festivals are a valuable product, gave these events the perfect space to develop and proliferate, beginning a process of professionalization that has lasted until the present.

Music festivals, which had mainly focused on classical or folk music concerts until that moment, followed this model very closely, exploiting different concepts and genres as time went by. The evolution of this professionalization process can be separated into a number of clearly defined phases, as indicated by Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan in the introduction of *'Focus on Festivals'*.

We must not forget, however, that the situation was not the same in all countries, nor the evolution of their festivals. For instance, during Franco's dictatorship in Spain, which lasted until the second half of the 70s, only festival proposals which were friendly with the regime were supported, such as La Quincena Musical de San Sebastián (1938), the Festival Internacional de Música y Danza de Granada and the Festival Internacional de Santander (both from 1952).⁷ This limited the festival growth in Spain, while new proposals were constantly appearing in Europe.

To put another example on how this model does not explain the evolution in all the European countries, in Hungary, a really active country in terms of music festivals during the 1920s and 30s, the end of World War II did not bring a new wave of music festivals. Instead, due to political reasons, freedom of expression in Hungary became badly damaged and cities were no longer allowed to organize art or music festivals.⁸

Nevertheless, in an aim to contextualize the process generally followed by festivals in Europe over the last 70 decades, I will go through the aforementioned separated phases, describing their main features and presenting some of the most important music festivals that emerged from them.

The age of reconstruction (late 1940s and 1950s)

This phase, just at the end of World War II, started with a devastated Europe in need to rebuild itself and to create new notions of solidarity and international collaboration in an aim to prevent future conflicts. At the same time, the Cold War between the United States and the Soviet Union was developing, and Europe became separated into the capitalist, liberal democratic West Europe and the communist East.⁹

⁷ " *Music festivals, a changing world*" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 182

⁸ " *Music festivals, a changing world*" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 112-115

⁹ Introduction of *Focus on Festivals: Contemporary European Case Studies and Perspectives* (Chris Newbold, Christopher Maughan, Jennie Jordan and Franco Bianchini, 2015)

In this context, festivals were seen as a counterbalance to this process of separation and a way to reestablish the dialogue between West and East. At the same time, cultural policies from those days tended to focus on raising the cultural level of people through a process of “democratization of culture”. It was not only about reconstructing cities and cultural facilities, but also a moral and civic reconstruction was needed.

Festivals then could be seen as powerful tools to share art and help to create understanding for differences while generating social and economic impact, and they could also act as an inspiring and encouraging force that reiterated the promise of peace, future stability and prosperity for Europe (Dragan Klaić, 2014). Many different and important general arts festivals were born with these purposes during this phase, such as the Festival of Edinburgh (1947), the Festival of Avignon (1947), the Festival of Holland (1947) and the festivals in Salzburg.

Music festivals, which still clearly focused on classical music, began to proliferate as well, and festivals such as the Cheltenham Music Festival (UK, 1945), Venice Biennale and Maggio Musicale Fiorentino (Italy, 1950) or Les Nuits de Fourvière in Lyon (France, 1946) did not take long to appear.

With the advances of television, the Eurovision Song Contest had its first edition in 1956, getting a huge audience that quickly increased even more as televisions arrived gradually to millions of European homes.

A bit later, around the end of the 1950s, festivals devoted to other genres began to appear in Europe as well, especially jazz and folk. Some of these festivals, often influenced by the festival trends in the U.S., were: Sidmouth Folk Festival (UK, 1955), Comblain-la-Tour (Belgium, 1959), Molde International Jazz Festival (Norway, 1961) and Kortrijk (Belgium, 1963).

Festivals as tools towards social and political change (late 1960s and 1970s)

The strong relationship established between festivals and the government, which often used them with compensatory and expository objectives and whose policies focused only on their own idea of what festivals should be, led a large number of artists to frustration, making them feel part of a great political mechanism that trapped and limited them.

A new generation of more rebellious and radical artists appeared, who often worked in social contexts and rejected certain formats and concepts. They encouraged the emergence of festivals with alternative structures, which often broke with the traditional cultural areas and moved to marginal and abandoned places, like old factories or farms.

As indicated in the introduction of *'Focus on festivals'*, in this period festivals “became community-focused and/or explicitly political, and forums for symbolic resistance, an expression of the

developing oppositional youth culture and radical movements of that era (including feminism, gay and ethnic xix minority activism)". The authors also explain how there was a shift from "democratization of culture" to a "cultural democracy", which was expected to make people "recognize their condition of subordination and oppression and lead them to a radical social and political change".¹⁰

Regarding music festivals, the late 1960s and 1970s brought some of the biggest pop and rock events, often modeled after the Woodstock Festival (1968)¹¹. These were often held in farms and were good representations of the alternative, more radical festivals that characterized the era. Some examples are the Châtelet festival (first pop festival in Belgium, 1965), Isle of Wight (UK, 1968), Pinkpop (Netherlands, 1970), Roskilde (Denmark, 1971) or Glastonbury (UK, 1971).

These new festivals, however, did not reach some notable countries such as Spain or France at that time. The first was still subject to a dictatorship, where only classical and folk music events were recognized and used to get international reputation. In France, on the other hand, the Gaullist regime obstructed the spread of these festivals, and the arrival of these genres did not occur until the 1980s, when the Socialist Party won the elections and there was a huge remodeling in the national cultural policies.

Nevertheless, European festivals as a whole found themselves in a phase of continuous innovation during the second half of the 1970s, with new concepts and formulas being constantly created and with local and regional authorities getting involved in their financing.

The involvement of the private sector (late 1980s and 1990s)

This phase was characterized by the development of a more commercial and economic approach to festivals, marked by the growing involvement of the private sector, which saw the potential festivals had to reach audiences and their possibilities for sponsorship and patronage strategies.

Local authorities also became increasingly interested in festivals as vehicles for urban regeneration and economic restructuring in cities such as Glasgow, Rotterdam, Hamburg, Turin or Barcelona¹². As the authors of *Focus on Festivals: Contemporary European Case Studies and Perspectives* indicate, "Festivals during this phase became increasingly part of tourism promotion and city marketing strategies, aimed at attracting increasingly mobile capital, businesses and skilled personnel"¹³.

¹⁰ "Focus on Festivals: Contemporary European Case Studies And Perspectives" (Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan, 2015), page 19

¹¹ "Music festivals, a changing world" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 170

¹² "Focus on Festivals: Contemporary European Case Studies And Perspectives" (Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan, 2015), p. 19

¹³ "Focus on Festivals: Contemporary European Case Studies And Perspectives" (Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan, 2015), p. 19

This phenomenon was very marked in Spain, whose cultural policies had improved greatly since the promulgation of the Constitution in 1978. During the 90s, many for profit organizations emerged to promote different music festivals in Spain, such as Sónar (1994), FIB (1995) and Primavera Sound (2001).

Numerous similar festivals appeared around Europe during those years, such as the Sziget (Hungary's largest private festival, 1993), V Festival (UK, 1996) and Paredes de Coura (Portugal, 1993). Some older festivals, such as the Reading Festival (1972)¹⁴ or the Love Parade (Germany, 1989)¹⁵ were forced to resort to private funding in order to survive, something that other festivals, born with a more radical or revolutionary identity, have tried –unsuccessfully in many cases- to avoid.

The present time (2000s to the present)

The life of music festivals during these last two decades has been marked, mainly, by the continuity of the tendencies already observed during the previous phase, the effects of the economic crisis suffered since 2008, the effects of digital technologies and the '*festivalization*' phenomenon.

At the beginning of the XXI century, the private sector continued to get more and more involved in festivals. Due to their ability to attract more sponsorship and private donors than other cultural activities or institutions, festivals have ended up becoming the 'private face' of cultural activities. It has been common for these collaborations to end up raising tensions between festival organizers and private partners, especially because of limitations in the festival's autonomy established by these partners or the difficulty to satisfy their objectives.

When it comes to public policies regarding festivals, even though there are different cases, the general rule has been for them to reduce their financial support during these last years, seeing the ability of festivals to obtain private financing and the scarcity of public money. This varies from genre to genre, and we can observe for example that some classical, jazz/blues and world/traditional music festivals still rely heavily on public funding, while rock/pop festivals tend to be more involved with the private sector. We can observe that destination tourism is still one of the main objectives in public policies regarding music festivals.

Festivalization is a social phenomenon related to the big proliferation of festivals that has taken place in the last decades. As explained in *Music Festivals, a Changing World*: "First, audiences

¹⁴ "Reading and Leeds festival cans Carling sponsorship" (Rosie Swash, The Guardian, 2008)

¹⁵ "For Berlin Love Parade All They Need Is Love and Corporate Sponsorship" (Cecilie Rohwedder and Alfred Kueppers, 2000)

have been attracted by the media attention given to large festivals and the presence of headliners, while artists and producers are enthused by the new-found profitability of live performances. This current has become so spectacular that cultural venues and institutions have tried to profit from it by developing their own events during their regular seasons. The result is a widespread *festivalization*.¹⁶

There is a clear trend towards larger and larger festivals across Europe, which has caused for small festivals to become increasingly vulnerable. Another consequence of *festivalization* is the emergence of 'cloned festivals', or festivals taking place at more than one place¹⁷. This is a clearly for-profit model, where festival organizers aim to obtain the maximum benefit while dispersing costs, as well as obtaining international positioning and becoming larger.

The arrival of the digital technologies has also affected music festivals greatly. While not all the events rely equally on them in terms of promotion and positioning -being those festivals addressed to younger audiences the ones that work harder on their digital communication strategies-, all of them have been affected. Digital communication has favored hugely the internationalization of festivals, and it has also caused a big increase in the festival tourism trends. People can now access information very easily, and many festivals find it much easier to reach their target.

Regarding the economic crisis, it has affected the ability of governments to continue funding some public events in all regions, although of course not equally. Nevertheless, the relationship of music festivals with private financing as well as their increasing popularity has allowed many festivals to become huge during these years, while others have died. In general, however, it can be concluded that the economic recession has not caused a paradigm shift for festivals in Europe.¹⁸

¹⁶ "Music festivals, a changing world" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 307

¹⁷ "Focus on Festivals: Contemporary European Case Studies And Perspectives" (Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan, 2015), p. 21

¹⁸ "Music festivals, a changing world" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 68

Period	Context	Festivals	Examples
Late 1940s – 1950s	Devastated Europe in need to rebuild itself and to create new notions of solidarity and international collaboration with the aim to prevent future conflicts	Festivals as tools to share art and create understanding for differences while generating social and economic impact.	Chenltenham Music Festival (1945), Les Nuits de Fourvière (1946), Venice Biennale and Magio Musicale Fiorentino (1950)
Late 1960s – 1970s	The strong relationship between festivals and governments led to a situation where artists felt part of a political mechanism that trapped them and limited their creativity	Festivals as tools towards social and political change, often with alternative structures that broke with the traditional cultural areas and moved to marginal and abandoned spaces; rock/pop genre gained importance.	Châtelet (1965), Isle of Wight (1968), Pinkpop (1970), Roskilde (1971), Glastonbury (1971)
Late 1980s – 1990s	Development of a more commercial and economic approach to festivals, marked by the growing involvement of the private sector as well as the local authorities. High growth of the number of festivals in the landscape, as well as their popularity.	Festivals were used as vehicles for urban regeneration and economic restructuring by some local authorities, as well as tools to reach audiences and improve the positioning by sponsors.	Sziget (1993), Paredes de Coura (1993), Sònar (1994), V Festival (1996)
2000s – Present	Continuation of the trends seen in the previous phase. Unprecedented number of festivals in the landscape, which is a phenomenon known as <i>festivalization</i> . Some music festivals damaged by the economic recession.	<i>Festivalization</i> has lead large festivals to become bigger and more popular, while small events are increasingly vulnerable. The arrival of the digital technologies had a huge effect on the management and communication of festivals, making it easier for them to reach their audiences and increasing their value to sponsors.	Primavera Sound (2001), Rock in Seine (2003), MITO Settembre (2007), Lollapalooza Berlin (2015), Classical Music Festival Pula (2016). ¹⁹

¹⁹ Own elaboration with information from the chapter. Main source: "Focus on Festivals: Contemporary European Case Studies And Perspectives" (Chris Newbold, Jennie Jordan, Franco Bianchini and Christopher Maughan, 2015)

IV. STUDY OF THE EUROPEAN MUSIC FESTIVALS²⁰

As repeatedly mentioned, European music festivals make up a totally diverse and heterogeneous paradigm, so broad and little studied that we don't even know the exact number of festivals that shape it. To get an idea, it is accepted that there are about 970 festivals in Spain²¹, while 1238²² festivals are calculated to exist in Germany and a figure of more than 2000 is estimated in France²³. These numbers are not very reliable, given the different conceptions of "festival" that exist in each country and the general lack of data, but to get an idea, that would suppose more than 4246 music festivals for about 196 million inhabitants, or one festival for every group of 45.000 people in these countries.

Given the huge amount of circumstances that affect these events and make each of them unique, it is very difficult to generalize about their situation. Their nationality, music genre, budget and age, as well as how they obtain their financing or what are their motivations, are some of the factors that bring us to this highly heterogeneous landscape where generalizations lead inevitably to the loss of insightful information. During this chapter, I will study European music festivals as a whole through a series of defined features, such as their genre, age, budget and their communication strategies, presenting several examples of in an attempt to illustrate their wide diversity.

However, as already mentioned, generalizing while studying these events can lead to confusion and non-reliable results. This is the reason why there will be another chapter, following this one, where I will classify festivals according to the music genre they are devoted to, which is their most defining trait.

Main features of the European music festivals

Music genre

The music genre a festival is focused on is its most influential characteristic, since it has an enormous effect on the type of audience that will attend it, the needs it will present and the format it will follow, hence defining most of it.

In Europe we find music festivals devoted to almost any genre or culture. To give some examples, we can mention: classical music, jazz, opera, rock, pop, folk, metal, reggae, hip-hop, techno or even gothic music. Something that all these genres have in common is the great budgetary

²⁰ Whole chapter based on the work "*Music festivals, a changing world*" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 41-72, 84-113, 121-146

²¹ "*Anuario Estadístico De España 2017*". (Instituto Nacional de Estadística, 2017), pp. 127.

²² "*The Music Market in Germany*." (Canadian Association for the Advancement of Music and the Arts, 2014)

²³ "*French Music Market Report*" (Canadian Association for the Advancement of Music and the Arts, 2017), pp. 5

diversity presented by their festivals. The general rule is that in all genres there are a large majority of small and medium sized festivals and a few giant festivals, which have huge budgets and are capable of attracting several thousands of people. Some examples of these big festivals, present in all genres -although with special emphasis in rock/pop music, could be: Rototom Sunsplash (reggae, Spain, 1994), Tomorrowland (electronic and techno, Belgium, 2005), Umbria Jazz (jazz, Italy, 1973), Glastonbury (rock, UK, 1970), Festival d'Aix-en-Provence (classical music, France, 1948) or Cambridge Folk Festival (folk, UK, 1965).

Among these, we could consider that the most outstanding genres in the present, either because of their tradition or the impact they generate (as well as the great representation they both have in the European landscape), are classical music and rock/pop -and other genres associated with it, such as techno or house. Classical music was the focus of most music festivals until their professionalization, and even today it retains a role of great importance and cultural value, making it the genre that receives more subventions and is more protected by the public sector. Rock/pop festivals arrived in Europe in the 1960s, often occupying large outdoor spaces and loaded with political messages. In recent decades, this genre has been gaining popularity and attracting bigger audiences, leading to the appearance of a many macro-festivals (Roskilde -Denmark, 1971-, Lollapalooza Berlin -Germany, 2015-, Rock in Seine -France, 2003-) and also the birth of a large amount of small festivals that try to benefit from the popularity the genre has gotten in recent years.

Age

There are some festivals in Europe that have been run for more than a century, as is the case of the Three Chords Festival (UK, 1715)²⁴, the world's oldest non-competitive classical music festival, or the Ghent Festival (Belgium, 1843), one of the biggest city festivals in Europe -attended by about 2 million people every year²⁵.

Very different from these two, the growing popularity of music festivals not only as a cultural asset, but especially as a leisure asset has led to the birth of a large number of new festivals in recent years, as indicated in the first chapter, which are often motivated by the capacity these events have to attract masses and the growing interest the private sector has placed on them. Many of these festivals are devoted to rock/pop, electronic, house and other popular music, although the appearance of new festivals is common across all genres. Some examples of recently born festivals, among many others, are: Mad Cool (rock/pop, Spain, 2016), Untold Festival (EDM, house, rock, Romania, 2015), Glitch (house, techno, Malta, 2016), Lollapalooza Berlin (rock,

²⁴ "About Us" Three Choirs Festival official website. (n.d.).

²⁵ "Ghent Festival (Belgium)"Tripadvisor (2018)

electro, Germany, 2015), Brighton Alternative Jazz Music Festival (jazz, UK, 2015) and Malta World Music Festival (world-traditional, Malta, 2017).

The average age of European festivals is, of course, far from both extremes. The average age of the 390 European festivals studied in *Music Festivals, a Changing World* is 21.5 years, while the median is 18. If we separate their age in intervals, we find 24% of festivals with less than 10 editions, 28% between 10 and 20 editions, 23% between 20 and 30 and 25% with more than 30. We can conclude, then, that new festivals have been appearing regularly in recent decades, with 52% of them having started in the last 20 years, which has led to a huge growth in the number of events present in the current landscape. However, there is also a significant amount of older festivals, whose expertise and positioning allow them to enjoy a certain level of stability that younger festivals normally lack.

When it comes to the interaction between the music genre and the age of the festival, it is easy to assume that the majority of older music festivals will be devoted to classical (mainly), jazz and world-traditional music, while the majority of newer festivals will be focused on rock/pop. We can confirm it in the following graph, where we can also observe the growth of popularity of the rock/pop genre over time and the decrease in the growth rate of classical and jazz music festivals.

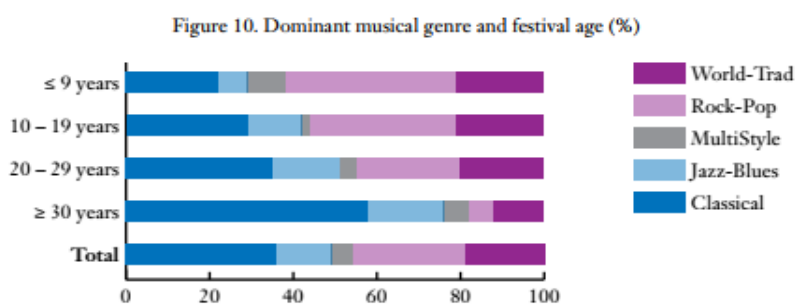


Figure 1. *Music Festivals, a Changing World* (2013), p. 52 p.

Format

Music festivals in Europe present very diverse formats because of the many variables that affect them. In terms of their duration and program, we find great differences depending on the genre and the budget the festivals have, and the same happens with the audience sizes. According to the study carried out in the work *Music Festivals, a Changing World* (2013), the average is 10 days of activity, and the median is 7, but these figures are not very representative, as a 23% of these events last a maximum of 3 days, while a 10% last more than 23. In terms of the number of concerts per festival, the average is 45, while the median is 26, indicating that the average is highly influenced by extreme values. These values, however, differ greatly depending on the genre. For instance, classical music festivals are the longest in terms of days of activity (with a median of 11 days), but they also offer the less concerts per festival (a median of 19). Rock/pop festivals, on the other hand, are the shorter in days (with a median of 4), but their programs tend

to include the highest amount of performances (a median of 32), creating short and intense music festivals.

As for festival audiences, diversity is again the main rule. In Europe, we can find festivals that barely attract 200 people, like Kalvfestivalen (Sweden, 2004), while many of the aforementioned big festivals can easily attract audiences of more than 200,000 people, and some festivals that are spread across many different locations (and often free), such as Fête de la Musique (France), Ghent Festival (Belgium) or B.A.M (Spain), can attract millions of people. As already mentioned, we find in all genres a big amount of small and medium sized festivals, with audiences below 30,000 people, and a reduced amount of big festivals. In the study made in *Music Festivals, a Changing World* the median in the number of audience members was placed in 7,888, indicating that more than a 50% of the festivals in the sample attract less than 8,000 people. In fact, 20% of the festivals attract less than 3,000 people, while a 10% of the sample attracts more than 80,000 participants.

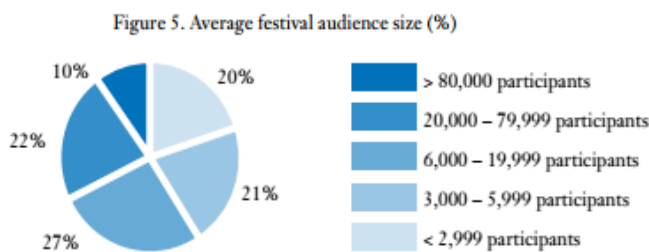


Figure 2. *Music Festivals, a Changing World* (2013) p. 49

It is also interesting to observe the prices and ticketing policies in music festivals. Being events that take place in a single moment in time, it is normal for music festivals to change their prices as the line-up is announced and to be more expensive the closer the event is to happening. The average price of tickets for all genres is 26€, although of course this value differs again depending on the genre. The most expensive festivals tend to be multi-style or devoted to rock/pop music, with average prices of 33€ and 28€ euros respectively. World-traditional, jazz and classical music festivals tend to be cheaper (average prices of 20€, 20€ and 23€ respectively), probably because the subventions they obtain (and their generally smaller dimensions, that let them have lower costs) allow them not to depend as much on income from ticketing. Free music festivals, on the other hand, represent a 11% of the total in the 390 festivals sample.

These events are held in a wide variety of spaces and venues, again often linked to their genre. Classical and choral music festivals, for instance, are normally held in previously equipped venues and spaces, prepared for this type of music, while many rock festivals explore more daring concepts, being held in costly to equip facilities that sometimes include camping areas. We find festivals both in large cities and in rural environments, even in places that are difficult to access. Some of the most common spaces are concert halls and venues, parks, squares, forests, farms

and factories. As already mentioned, there are also festivals spread across different halls and spaces of a city or region, such as Fête de la Musique (France) or Genk on Stage (Belgium).

July is the month with more festivals in Europe, followed by the month of August. Together they account for 51% of the 390 festivals sample, while 21% are celebrated in the months of June and September. We can conclude, then, that music festivals are mainly held during the summer, although logically there are several differences between this distribution in northern and southern countries.

Budget, income and expenses

Together with the genre, the budget is the other decisive factor in describing the characteristics and management models used by festivals, and as with the rest of the variables, we find great diversity. In Europe, 2% of festivals have budgets under €45,000 and 20% under €80,000. On the other hand, 21% of the festivals studied have budgets of more than €900,000, and 2.1% more €2.1 million. The average budget of the 390 festivals sample is 860.000€, obviously inflated by the extremely high budgets some big festivals have. The median, more representative in a case like this, is 273.000€, so we can conclude that the regular budget for a music festival would be around 300,000€. It is interesting to see not only the value of their budget, but also where they get it from and how they invest it.

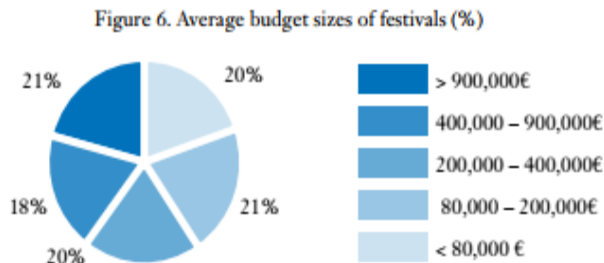


Figure 3. *Music Festivals, a Changing World* (2013) p. 49

As for the total expenses, the median figure is around €290,000, indicating that the costs of fifty percent of them do not reach that amount. These costs can be easily divided into artistic (mainly related to the hiring and reception of artists), technical (related to the equipment of the premises), administrative (team salaries and other costs) and communication costs²⁶. When we compare the distribution of these costs across genres, we can observe that artistic costs account for about 50% in all of them, while communication costs are the less significant, with an average of 12% of the total budget. Technical and administrative costs vary according to the genre, but they represent 19% each on average.

²⁶ “*Music festivals, a changing world*”(Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 59

When it comes to the income sources, these are mainly divided into public funding (45% on average), ticketing (26%), sponsorship and patronage (14%), festival-generated income (9%) and, to a lesser degree, friends of the festival (2%) and others (4%). As we can predict, ticketing and festival generated income will be more important for multi-style and rock/pop festivals, which have bigger audiences and higher prices.

According to this information, public funding is clearly the most important source of income for music festivals. It represents a 54% of the total budget of classical music festivals, 46% for jazz, 45% for multi-style, 44% for world-traditional music and 31% for rock/pop. We must take into account, however, that classical music festivals tend to have smaller budgets, so it is logic that contributions from the public sector represent a bigger part of their total budget than in the case of the other genres. This funding is mainly provided on a local/regional basis, with a few exceptions, and subventions are not only granted to festivals with long tradition, but they are also a very important part of the budget of new festivals.

The economic crisis has prejudiced many festivals, especially in those countries most affected by it such as Spain and Ireland. The festivals most affected have generally been those with lower budgets and also the newer ones, which have often had reductions in their budget that have forced them to change their format or cease their activity altogether. We cannot conclude, however, that the economic crisis has produced a paradigm shift in the universe of festivals in Europe, since the lack of budgetary stability has always been a defining feature for new and small festivals. In fact, music festivals have increased their popularity in the recent years, with many of them being born and others experiencing a huge growth (e.g. Glastonbury Festival, Primavera Sound, Sziget). In fact, during the crisis years, the number of festivals that have seen their budget reduced is roughly the same as the festivals that have managed to make it increase.

Communication

Festivals use a variety of tools both to communicate with their audiences and to attract new crowds. The obvious differences among the audiences of the festivals make these tools vary greatly, depending on the best ways to reach the target audience for each event. The most common tools used are printed materials (such as flyers, posters or banners), websites and social networks. Paid advertising on local and national media, as well as publicity exchanges, carried out by more than 60% of the festivals, are also very common practices. As you can see in the graph, other tools such as audio-visual materials, merchandising and smart-phone applications are used with less frequency, since these tools are generally aimed to reach young audiences, so only festivals that meet this condition use them. As mentioned in the budget section, the use of all these communication tools represents an average cost of 12% of the total festival budget.

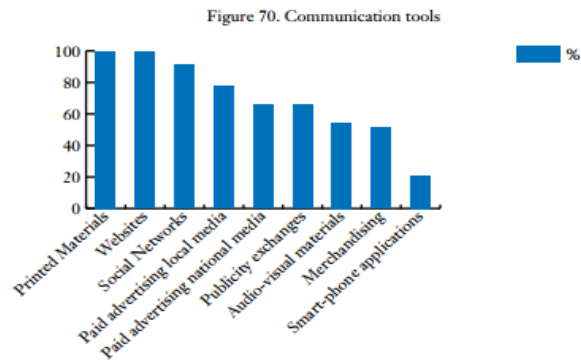


Figure 4. Music Festivals. A Changing World (2013) p. 127

Digital communication has had, as in all sectors, a great impact, and the vast majority of festivals have, at the very least, a website, and in many cases they also use social networks. The use they make of these tools is obviously varied: we can find festivals that work really hard on their digital strategy, trying to establish connections with their audiences and position themselves through the use of social networks and an attractive website (especially those with younger audiences, such as rock/pop and multi-style), while others don't actually follow much of a strategy, merely using their website as a virtual corkboard where they publish the line-up, some important information and often offer the possibility to buy tickets online, showing no interest in getting to interact with their audiences.

It is interesting to note that in the majority of cases, both in large and small festivals, communication strategies are implemented by the festival itself, and very rarely outsourced. It is common for all festivals to have a communication department, with an average of 3 communication specialists.

When it comes to international communications, it is fairly normal even for small festivals to have an international communication policy (64% of the sample of 390 festivals indicated they do), and most of them (71%) have their website translated into different languages. The most frequently used tools are press releases with international media (53%), advertisement publications in foreign media (42%) and the organization of public presentations or conferences abroad (14%). These practices are, for obvious reasons, more popular among festivals with larger budgets, which seek to attract large masses of people and often have a major economic impact in their region.

V. FESTIVAL FEATURES BY MUSIC GENRE²⁷

It has already been established that music genre is the most defining trait of music festivals, together with the size of their budgets, as it has a big effect on their formats, audiences and needs. In the following pages, music festivals will be classified and described according to their music genre, following the classification established in the work *Music Festivals, a Changing World* (Emmanuel Négrier, Lluís Bonet and Michel Guérin, 2013), the only numerical study about European festivals and an important source of information for this chapter.

In the book, music festivals are divided into 5 genre categories: classical music, jazz/blues, rock/pop, world-traditional and multi-style. Although there are of course many other music styles in the European festival landscape, as described in the previous chapter, these groups manage to divide festivals in a useful way to show both the similarities and differences they present.

Classical music

As already mentioned, this genre is especially relevant when trying to understand music festivals in Europe, both because of the amount of festivals devoted to this genre we find in the landscape and its historical and cultural importance.

There are some festivals of great international relevance devoted to this genre, such as Salzburg Festival (Austria, 1920) or Bachfest Leipzig (Germany, 1908), but the general rule is for these festivals to be small, normally held in closed spaces and attended by reduced audiences. When it comes to the experience of the festivals, it has already been stated that this genre gathers most of the old European festivals, and their average age in the study *Music Festivals, a Changing World* (2013), which included 141 European classical music festivals, is 28 years. We can, however, find some examples of new music festivals devoted to this genre, such as MurciArt (Spain, 2017) and Classical Music Festival Pula (Croatia, 2016).

Classical music festivals are usually held in pre-equipped spaces for this music genre, such as concert halls or auditoriums, a feature that allows them to reduce their average technical costs. They tend to be extended over long periods of time, generally offering concerts on the weekends of a certain month or period. They have an average of 14 days of programming (a median of 11), the highest among all genres, but their programs are also the ones that offer less concerts, with a median of 19. Their median audience is 5,000, the lowest across all genres, so we can picture these festivals as the more intimate.

²⁷ Whole chapter based on the work "*Music festivals, a changing world*" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 84-113, 121-146

We can, of course, find exceptions to all these rules, like the Bregenz Festival (Austria, 1946), which is held at Lake Constance and offers programs with more than 100 concerts, attracting masses of over 200,000 people²⁸, or the MiTo Settembre (Italy, 2007), which is held across several indoor and outdoor spaces in the cities of Milan and Turin and offers at least 3 concerts per day²⁹. Diversity is the main rule even inside genres, and festivals try to innovate in order to create new concepts and add value to their offer.



*Figure 5. MITO Settembre Musica, Auditorium Rai.
Author: MITO Settembre Musica.*

Classical music median expenses sum 270,000€, which means that 50% of the festivals do not reach that amount. These are mainly invested in artistic costs, that represent a 52% of the total on average, proving the great importance these festivals give to the quality of their program. Because of their age, classical music festivals tend to be very structured and established, with permanent staffs that make their administrative costs higher than for other genres, representing a 20%. The fact that they are normally held in pre-equipped venues allows them to reduce their technical costs to about an 11% of their total expenses, while communication costs account for a 13% on average.

Regarding their funding sources, these festivals rely very heavily on public subsidies, and more than half of their income (54% on average) is obtained through them. After that we find benefits from ticketing, which account for a 22%. It is curious to note that this is the genre that offers the least free concerts (even though it is the one receiving more public aid) because of the high value given to these performances and the belief that people must pay in order to attend them. On the other hand, sponsorship and patronage account for 12% of the classical music festivals income, while other sources of income, such as festival generated income and friends of the festival, account for the remaining 12%.

Regarding their communication techniques, festivals devoted to classical music generally follow traditional approaches. Being popular especially among old audiences, these festivals find the best tools to communicate with their public in traditional instruments such as banners, flyers or leaflets, as well as paid advertising on local and national media. Although most festivals have a webpage, these tend to be basic, with information about the festival and very limited services. The use classical music festivals make of social networks is also limited, and they tend to show

²⁸ "History Of The Bregenz Festival." Bregenz Festival official website (2015).

²⁹ "Introduction & History | Festival internazionale della Musica Torino Milano." MITO Settembre official website (2018).

little interest in interacting with their audiences, focusing instead on providing information about the festival.

Rock/Pop

Rock/pop is the second most outstanding genre when studying music festivals, given its importance and great proliferation in recent years, which has led it to an exponential growth. This genre gathers most of the wealthiest music festivals, capable of attracting large crowds and sponsored by different brands, which allows them to create very complete programs. Although these big festivals tend to have a certain level of experience (for instance Festival Internacional de Benicassim (Spain, 1995), Roskilde (Denmark, 1971) or T in The Park (UK, 1994)), we can also find some examples of new festivals that were born big, such as Mad Cool (Spain, 2016) or British Summer Time (UK, 2013). The success these festivals have achieved has led to the birth of many new rock/pop music festivals, which try to benefit from the interest that the audiences and the brands have put in this genre, causing a general growth in the number of events devoted to it. As in any other genre, there is a big number of small festivals for each big one, and 40% of the rock/pop festivals are attended by less than 6,000 participants. The heavy presence of these small festivals and the effect of bigger festivals leave the genre with a median audience of 10.379 participants in the study carried out in the work *Music Festivals, a Changing World* (2013).

These festivals tend to work hard on standing out from the rest, and they are held in all kinds of spaces and facilities. In urban areas, we can find rock/pop festivals in any space we can imagine, for example hotels, concert halls and venues, squares, parks, or even places of historical interest, such as the



Figure 6. Glastonbury Festival, 2016. Author: Katy Sánchez

Tempelhof airport in Berlin or the Petrovaradin Fortress in Novi Sad. Today it is difficult to find regions without a rock/pop festival, and a large number of them are held in rural and natural areas. Some examples could be: mountains (Meadows in the Mountains, Bulgaria, 2010), forests (Vida Festival, Spain, 2014), beaches (Lost & Found Festival, Malta, 2015), farms (Glastonbury, UK, 1970), small islands (Sziget Festival, Hungary, 1993), deserts (Nowhere Festival, Spain, 2002) and even volcanoes (Secret Solstice, Iceland, 2014) or caves (Træna Festival, Norway, 2003). Many of them also offer the opportunity to camp, adding value to the event and making it more intense.

If we look at their format, we can observe that it is quite the opposite to the one followed in classical music festivals. With a median of 4 days of programming, these festivals are generally the shortest, although they concentrate the largest number of concerts in this short time, creating rich and intense programs that add up to a median of 32 concerts, the highest among all genres.

It has already been stated that this genre gathers most of the festivals with largest budgets in Europe, which can reach figures higher than 10 million euros. However, it is worth remembering again that like all genres, rock/pop is composed of a large majority of small and medium-sized festivals, with median expenses of 310,000€, which indicates that 50% of them are below this amount, while the average is greatly affected by the extreme values of massive festivals and goes up to more than 1,200,000€.

As in all genres, these budgets are mainly devoted to artistic costs (approximately 47% of the budget). Technical costs stand out from the rest, representing a 27% of the expenses, given the difficulty to equip some of the spaces chosen to hold these festivals, and communication and administrative expenses account for the remaining 26%.

When it comes to their income sources, these festivals tend to depend heavily on their ticketing revenues, which represent 35% of the total. These festivals, with an average price of 28€ and the greatest capacity to attract audiences, base a large part of their income on ticket sales and other festival-generated income, such as the sales of drinks and merchandise, which represent another 14%. It should be noted public contributions, although they represent a small percentage of the total budget of rock/pop festivals when compared to the other genres, are still an essential part of these budgets, especially for new and small festivals, and represent an average of 31%. Sponsorship revenues are less significant, averaging 15%, although this figure varies greatly depending on the festival, and for some of them these practices are the main source of income. Other sources of income and friends of the festival contribute the remaining 5%.

Although traditional tools of communication such as printed materials and merchandising are still used by these festivals, the arrival of the digital technologies has meant a true revolution for them. Most rock/pop music festivals have very complete websites, which offer different services and are constantly updated. Many of them have also developed smartphone applications, and they are active in social networks and even forums, showing a lot of interest in interacting with their public and potential new audiences through the digital technologies.

Jazz/Blues

Jazz music festivals arrived to Europe in the late 1950s and, although their role is not as significant as that of the genres studied so far, their generally loyal and mature audiences have allowed this genre to continue being relevant in Europe. As in all other genres, we find a large number of relatively small festivals, with about 40% of the festivals having audiences below 6,000 members

and about 67% with less than 20,000. However, as in all previous genres, we also find festivals of great importance and capable of attracting large masses. Some of the most important examples in Europe are Jazz à Vienne (France, 1981), North Sea Jazz Festival (Netherlands, 1976) and Umbria Jazz (Italy, 1973).



Figure 7. Jazz Band by the street of Perugia during Umbria Jazz. Author: Angelo Romano

These festivals usually take place in pre-equipped venues, such as concert halls and clubs, but it is not rare to find them in large venues or outdoor spaces. As for their format, they are somewhere between the classical and rock/pop models, with programs that last a median of 6 days and an average of 9, that offer about 26 concerts. The majority of these festivals

attract audiences between 3,000 and 30,000 members, so they are not as intimate as classical music festivals, although they clearly tend to be small or medium-sized. This is also the genre with the lowest number of festivals with high budgets (more than 900,000€), which supports this idea.

The median of the total expenses of jazz music festivals is the second lowest after classical music, with a figure of about 280,000€. These expenses are, once again, mainly devoted to artistic costs, which represent a 46% on average. The technical, administrative and communication costs are evenly distributed in this genre, leading jazz to be the genre that invests a larger percentage of its budget in communication.

On the origin of their income, we find that these festivals are highly dependent on public funding contributions, which represent 46% of the total. Ticketing revenues account for a 23% of the budget on average, while sponsorship and patronage account for a 16%. The remaining 15% corresponds, in this case, to festival generated income, income from friends of the festival and others.

Their communication strategies have similar traits with both the classical music and rock/pop approaches, mixing traditional tools with new technologies. They use printed and audiovisual material, as well as advertising on media, and many of them are active in social media and have complete websites. They use all these tools to reach their audiences, which are generally diverse in age -although they tend to be mature.

World- Traditional

This genre includes folk, traditional and world music festivals. These events serve purposes related to keeping individual cultures alive as well as allowing "guiless, pleasant and direct

encounters with other cultures through music³⁰. Many of these festivals arrived to Europe in the 1970s, often following folk-revival Anglo-American models, which offered acoustic blues, country and skiffle music performances. In the 1980s, however, this genre “became a lot more concerned with finding its own identity and seeking its own individuality, rather than a wider framework. The music world split, and the genre of ‘world music’ formed”³¹.

The majority of these festivals are small or medium-sized, with a 56% of them attracting audiences of a maximum of 20,000 attendees, and 35% attracting from 20,000 to 80,000 people. These audiences are very diverse in age, mainly composed by adults between 26 and 40 years (49%), but with representation of both younger (15%) and older (36%) audiences.



Figure 8. Folk dance performance at Kaustinen Folk Music Festival in the late 1970s or the early 1980s. Finnish National Board of Antiquities. Author: Teuvo Kaneurva.

One of the most interesting examples of folk and world-traditional festivals in Europe is the Boombal festival, which originated from the boombal parties, a recent phenomenon of folk dance parties, and takes place in August in Belgium, offering a set of activities such as dance workshops, dance concerts and, of course, live music³². Other remarkable examples are Tønder Festival (Denmark, 1974), Festival Interceltique de Lorient (France, 1971) and Kaustinen Folk Music Festival (Finland, 1968).

World-traditional and folk events tend to have formats similar to the ones devoted to jazz, with a median of 5 days of activity (an average of 8) and 27 concerts. These genres include several types of music with different technical requirements and audiences, and we can find them being held in many different locations, such as squares, parks, streets, museums, cultural centers or concert halls.

Their median expenses are 300,000€, and we find a majority of festivals with budgets around 400,000 - 900,000€, so they tend to be better funded than classical and jazz/blues festivals. As in all the previous cases, this genre also dedicates the greater part of its budget to artistic expenses (44%). The other costs are evenly distributed, although communication costs generally represent a slightly lower percentage. As for the origin of their income, these events also depend heavily on public funding, which accounts for 44% of it. Ticketing and festival-generated income

³⁰ *Celebrate Cultural Diversity! Buy a Ticket! Reading the Discourses of World Music Festivals in Croatia*. Piškor, Mojca. (2006), pp. 179

³¹ *World and Folk Music Directory*. Flanders Music Centre in cooperation with Muziekmozaiek Folk & Jazz (2013), pp.5.

³² “10 jaar boombal: het verhaal van de opkomst van het folkdansen in vlaanderen.” (Boombal official website, 2018)

account for 26% and 10% respectively, while sponsorship and patronage seem to play a less important role, accounting for just a 12% of the total income.

When it comes to the tools of communication used by world-traditional festivals, they use tools similar to those we have seen throughout the chapter, such as advertising in national and local media and printed materials. Many authors indicate that these festivals have shown special interest in using their websites and social networks to increase their visibility and gain new audiences, as well as in participating in forums and other platforms with the aim of interacting with their audiences.

Multi-style

This genre is very heterogeneous by definition, since it gathers many unconnected festivals which share the trait of not focusing on a dominant genre. Some of these festivals are committed to a certain instrument or theme, while others attempt to attract big and diverse audiences by offering acts of several genres. The diversity of their audiences makes these festivals inevitably attractive to the private sector, which can see the great potential and visibility of these events for sponsorship strategies.

Some of these festivals show a close relationship with classical music, and they often follow similar formats. Contrary to classical music festivals, however, multi-style events are actually the ones with higher budgets on average, which makes it easy to find a big number of medium-sized and large festivals, such as Festival d'Ile-de-France (France, 1976), and Festival de Peralada (Spain, 1987), or the macrofestival Helsinki Festival (Finland, 1968). The general bigger size of multi-style festivals responds to their facility to obtain financing, which at the same time allows these festivals to offer very complete line-ups that attract the biggest audiences (on average) among all genres, with a median of 17.500 participants.

These festivals, open to very different concepts, are celebrated in diverse spaces and venues, although it has already been mentioned that they are often related to classical music events, which makes them follow similar formats frequently: long programs (a median of 11 days of activity, the same as classical music) which are held in pre-arranged venues or spaces, like concert halls, chambers or places of cultural value. These festivals, however, tend to offer more concerts, with a median of 27 (19 for classical music) and an average of 80. This is the highest figure across all genres, which shows that there are some festivals with very extensive programs affecting the mean. like Kilkenny Arts Festival (Ireland, 1974), which offers 170 concerts³³.

³³ "*Music festivals, a changing world*" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 87

As already mentioned, the good relationship between these festivals and both the private and public sector, together with their ability to attract big audiences (which leads to higher benefits from ticketing), makes these festivals the best positioned in economic terms on average, with a median of 400,000 euros invested in expenses. These expenses are distributed in a similar way as in classical music festivals, where artistic and administrative expenses are the most significant.

On average, 45% of the economic resources available to these festivals come from public funding, while ticket sales and festival generated income account for a 32% of the total. As for the private sector, their contributions are more prominent than in any other category, representing a 19% of their budgets on average.

Although this genre often follows communication strategies similar to the ones used by classical music festivals, they also tend to use the new technologies to communicate with their audiences, since they aim to attract diverse crowds and the digital technologies are great tools to reach them. Many of these festivals have high quality websites and tend to be active on social networks, and some of them have even developed mobile applications to facilitate the experience, which often include maps, the program and other relevant information.

Summary table³⁴

		Classical	Rock/Pop	Jazz/Blues	World-trad	Multi-style
GENERAL FEATURES	Average age	28 years	15 years	N/A	N/A	N/A
	Venue	Pre-equipped spaces	All kind of spaces and facilities	Mostly Pre-equipped spaces	Very varied locations	Pre-equipped spaces
	Audience age	1% 18-25; 10% 26-40; 68% 41-60; 21% > 60	2% < 18, 38% 18-25, 51% 26-40, 8,5% 41-60, 0,5% > 60	4% 18-25; 36% 26-40; 58% 41-60, 2% > 60	15% 18-25, 49% 26-40, 35,5% 41-60, 0,5% > 60	6% 18-25, 29% 26-40, 60% 41-60, 5% > 60
FORMAT	Median days of programming	11	4	6	5	11
	Median number of concerts	19	32	26	27	27
	Median audience	5,000	10,379	7,818	15,000	17,500
	Average price	23€	28€	20€	20€	33€
BUDGET	Median expenses	270,000	310,000	280,000	300,000	400,000
	% from public funding	54%	31%	46%	44%	45%
	% from ticketing	22%	35%	23%	26%	25%
	% from sponsors	12%	15%	16%	12%	19%
COMM.	Communication	Traditional approach: banners, flyers, leaflets	Digital communication is key in their strategy	Traditional and digital communication mix	Special interest on digital technologies to interact with the audiences	Importance of digital technologies despite their similarity with classical

³⁴ Own elaboration with information from "Music festivals, a changing world" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 57, 60, 62, 86, 87, 99, 105, 127

VI. STUDY OF THE CATALAN MUSIC FESTIVALS

Now that we have studied the main features presented by European music festivals, I consider it is interesting to analyze the Catalan case, trying to find the degree to which the features identified in the previous study fit with our own model and which are the traits that differentiate the Catalan festival landscape from the rest.

To make this comparison, I will use information from the "*Festivals de Catalunya*" monograph, a revision of the report "*Catalunya, País de Festivals*" (2015), which was prepared by the Department of Culture of the Government of Catalonia in 2017 and follows the structure of the study conducted in *Music Festivals, a Changing World* (2013). Other important source is the document "*Anuari de la Música 2017*", which was co-created by the Representatives, Promoters and Managers Association (ARC) of Catalonia and the magazine *Enderrock*.

Catalonia is the autonomous community with more festivals in Spain, with an approximate total of 360³⁵. This concentration of festivals in the region can be explained by its touristic importance, which has led many municipalities to start festivals that can work as touristic attractions and economic stimulators, and also the cultural relevance of its capital, Barcelona, where many of these festivals take place.

When we look at the total of Catalan festivals we find a big amount of small and medium-sized festivals, which represent a percentage even bigger than in the European case. 41% of the Catalan music festivals have audiences with less than 3,000 members, and 60% with less than 6,000, while these figures were 20% and 41% respectively in the case of European festivals. The average number of audience members in the Catalan case is 15.389, while in Europe it was 28,455, and although both figures are not representative because of the effect massively attended festivals have on them³⁶, they do confirm the hypothesis that Catalan festivals tend to be less attended than the average in Europe. In terms of their budget, 51% of the festivals have less than 80.000€ at their disposal (20% in Europe), and 26% have between 80,000 and 200,000€ (21% in Europe), so Catalan festivals seem to be generally more limited in resources than their European counterparts³⁷.

However, we can also find good examples of big festivals in Catalonia. 3% of the festivals have audiences over 80,000 members, and 10% have budgets above 900,000€³⁸. In fact, two of Europe's most outstanding festivals take place in Barcelona every year: Primavera Sound and

³⁵ "*Festivals de Música a Catalunya*" (Departament de Cultura, Generalitat de Catalunya, 2017), p. 1

³⁶ "*Festivals de Música a Catalunya*" (Departament de Cultura, Generalitat de Catalunya, 2017), p. 3

³⁷ "*Catalunya, País De Festivals*" (Institut Català de les Empreses Culturals, 2015), p. 18

³⁸ "*Catalunya, País De Festivals*" (Institut Català de les Empreses Culturals, 2015), p. 15, 18

Sònar. These festivals, attended by more than 200,000 and 115,000³⁹ people respectively, have earned international acclaim and have become very popular among foreign audiences, who travel to the Catalan capital to attend the events and cause a significant economic impact in the city. Other outstanding Catalan festivals are Voll-Damm Festival Internacional de Jazz de Barcelona (jazz), Acústica (rock/pop), Cruïlla (rock/pop), Barcelona Acció Musical (multi-style), Festival de Cap Roig (rock/pop) and Jazz Terrassa (jazz)⁴⁰.

As for their format, Catalan festivals generally follow the same patterns we have seen in European festivals, although there are some differences worth mentioning. The clearest example is the popularity of salsa and latin music in the region (as well as in the rest of Spain), a genre listened by a 27,1% of the Catalan population according to the survey on cultural participation carried out by the Generalitat de Catalunya in 2016, which placed rock (with a 66%) and melodic and songwriters music (with a 31,8%) as the most popular genres.⁴¹ Although there are not a lot of music festivals devoted to salsa and latin music, it is very common to find acts of these genres in festivals that target young audiences. We can find several latin music performances in festivals such as Cara B (Barcelona, 2015), Primavera Sound (Barcelona, 2001) and other multi-style and rock/pop events.

As for classical music festivals, they are generally small, with crowds that rarely exceed 5,000 members and are normally under 1,000. An exception to that is Festival Castell de Peralada, which had 26,127 attendees on 2017 and is the biggest classical music festival in Catalonia, although it offers concerts of other genres⁴². Just as in the European case, these festivals tend to occupy extended periods of time (for example one month or two) and focus on the weekend days, offering a reduced number of concerts per day (often just one). Some examples of Catalan music festivals devoted to the classical genre are: Festival de Torroella de Montgrí (1981), Festival Pau Casals del Vendrell (1981), Festival de Pasqua de Cervera (2010) or Early Music Morella (2012).⁴³

Rock/pop music festivals set the other extreme, being the main genre for many of the biggest festivals and generally hosting the biggest crowds. 36,7% of the Catalan festival attendees in 2016 went to a rock/pop festival, while 25,6% of them attended a multi-style event, similar to what happened in the European case⁴⁴. Just like in Europe, these festivals tend to be short in time, often held during a single weekend or a week, and offer a big quantity of concerts. There is, of course, a big amount of small and medium-sized rock/pop festivals (Paupaterres (1998), (a)phonica (2004), Eufònic (2012), Clòwnia (2014) and Vida Festival (2014), for instance) and a

³⁹ "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 50

⁴⁰ "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 51

⁴¹ "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 37

⁴² "El Festival de Peralada cierra con una ocupación del 92% y 26.127 espectadores, un 2% más" (Europa Press, 2018)

⁴³ "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 87

⁴⁴ "Festivals de Música a Catalunya" (Departament de Cultura, Generalitat de Catalunya, 2017), p. 3

reduced number of big ones, like the aforementioned Primavera Sound (2001), Sònar (1994) and Acústica (2002), which have more than 100,000 attendees, or Guitar BCN (1990), Cruïlla (2005) and Rock Fest (2014), attended by more than 50,000 people.⁴⁵

We find, however, some differences in the way jazz/blues and world-traditional festivals appear in the Catalan landscape with respect to the European model. In Europe these two genres seemed to share some features regarding their formats and audience sizes, with jazz festivals being slightly smaller as a rule. In Catalonia, however, jazz festivals have a much more relevant role, with 2 of the 7 most attended festivals being devoted to the genre (Voll-Damm Festival Internacional de Jazz de Barcelona (1966) -126,000 people- and Jazz Terrassa (1982) -47,000-) as well as many other successful festivals (for example Nits de Jazz a Platja d'Aro (1998), San Miguel Mas i Mas Festival (2003) or Banc Sabadell Vijazz (2007), all of them with audiences of more than 20,000 members)⁴⁶. This genre has gained popularity in Catalonia in recent years both in number of fans and in the amount of record production. World-traditional festivals, on the other hand, present smaller sizes, similar to the ones we have seen in classical music festivals. The biggest folk festival in Catalonia is Tradicionàrius – Festival Folk Internacional (1988), which attracted 13,600 people in 2016, and the majority of these festivals have audiences below 5,000 people. Some other examples of these festivals are: Trobada d'Arcordionistes (1976), FIMPT (1981), PortalBlau (2008) and Connexions (2012)⁴⁷.

With this brief definition, we have been able to appreciate that while Catalan festivals generally fit in the European model, with diversity as the main trait for both of them, they also present some differences that separate them from the rule and make the landscape unique. In the following pages I will describe some of the main features that differentiate the Catalan ecosystem from the rest, in an attempt to show the effects that national and cultural variables have on festivals and the strengths and weaknesses presented by the Catalan model.

Festival concentration in touristic areas⁴⁸

As already mentioned, there are about 360 festivals in Catalonia, a large number if we take into account the size of the region. This fact responds to a set of different causes, like the touristic importance of the region (and the capacity festivals have to attract visitors), the increasing popularity of music festivals as leisure options among local and international audiences and the historic positioning of Catalonia as a European cultural focus.

⁴⁵ "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 51

⁴⁶ "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 85

⁴⁷ "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 83

⁴⁸ Section based on "Festivals de Música a Catalunya" (Departament de Cultura, Generalitat de Catalunya, 2017), p. 1

Catalan touristic and cultural policies often work together, using festivals as tools to improve both the cultural offer of certain regions and their tourist attractiveness. It is easy to assume, then, that the most touristic areas will present higher concentrations of festivals.



Figure 9. "Festivals de Música a Catalunya." Generalitat de Catalunya, Departament de Cultura (2017), p. 2

This map shows the geographical distribution of Catalan music festivals. Predictably, we find two outstanding festival concentrations in the most touristic areas of Catalonia (especially during the summer), one in Barcelonès (with 88 festivals) and its surrounding regions (Baix Llobregat (17), Maresme (19) and Vallès Occidental (15)) and the other in Costa Brava, in the *comarques* of Baix Empordà (26 festivals), Alt Empordà (23) and Gironès (23). The rest of the festivals are distributed more evenly, although logically the regions close to the sea show a clear tendency to have more festivals than those in the interior and north of Catalonia.

While we can find this kind of distribution in other highly touristic countries, especially those in the south of Europe such as Italy and Croatia, it is not representative of the European model. Besides, it is interesting to highlight that in the Catalan landscape we can't find examples of big festivals held in rural areas, while this model is very popular in other European countries such as

the UK (Creamfields, Glastonbury, Bestival) or Denmark (Tinderbox, Roskilde). Instead, the majority of Catalan big music festivals are held in Barcelona (Primavera Sound, Sonar, Guitar BCN, Voll-Damm Jazz Barcelona, Cruïlla, Barcelona Acció Musical, Jardins de Pedralbes, Festival Mil·leni), following a clearly centralized model. The rest of them are held in urban and generally touristic municipalities, such as Figueres (Acústica), Calella de Palafrugell (Cap Roig), Santa Coloma de Gramanet (Rock Fest) or Peralada (Festival Castell de Peralada).⁴⁹

Generally young festivals

As we have seen in the first chapter of this paper, contemporary music festivals started to appear in Europe after the end of World War II, starting a continuous growth that has led them to their current situation. At that time, Spain was under the dictatorship of Francisco Franco, which allowed only for a limited amount of music festivals –which had to be supportive with the regime– to take place and hindered the emergence of contemporary music festivals until the transition to democracy, at the end of the 1970s.⁵⁰

Although we can find some examples of music festivals that started during the dictatorship and are still active, such as Festival de la Porta Ferrada (1958) and Festival de Música de Cadaqués (1970) or Festival de Jazz de Barcelona (1969), the true emergence of contemporary music festivals did not happen until the 80s, motivated by the big improvements in cultural policies that came with the transition to democracy. Some of the festivals that appeared during the 80s are: Festival de Torroella de Montgrí (classical, 1981), Festival Internacional de Música Popular Tradicional de Vilanova i la Geltrú (folk, 1981), Festival de Jazz Terrassa (jazz, 1982), Festival Castell de Peralada (classical, 1987) or Tradicionàrius (folk, 1988).

The interest taken by the private sector in music festivals during the 90s led to the birth of a lot of festivals, especially devoted to rock/pop, which accelerated the apparition of several new festivals in Catalonia⁵¹. Some examples of these festivals are: Guitar BCN (rock, 1990), Schubertiada de Vilabertran (classical, 1993), Sònar (rock, 1994), Barcelona Acció Musical (multi-style, 1993), Nits de Jazz a Platja d'Aro (jazz, 1998) and Festival Mil·leni (rock, 1999).

During the last two decades, however, the number of festivals has grown in an exponential way, and every passing year a good number of new festivals appear in the Catalan landscape. Some examples of the long list of festivals that started after the millennium change are: Primavera Sound (2001), Black Music Festival (jazz, 2002), Acústica (rock, 2002), Cruïlla (2005), Banc Sabadell Vijazz (jazz, 2007), PortalBlau (folk, 2008), Early Music Morella (classical, 2012) and Bachcelona (classical, 2013).

⁴⁹ *Anuari de la Música 2017'* (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 51

⁵⁰ "Music festivals, a changing world" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 182

⁵¹ "Music festivals, a changing world" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 183

In 2015, the average age of Catalan music festivals was 15 years, remarkably lower than the European average, which is set at 21,5 years. This is easy to understand given the circumstances that delayed the emergence of festivals as well as the popularity these events have gained in recent years, which has led to the apparition of many young festivals that affect the average. In the same year, 42% of the music festivals had been active for between 0 and 9 years, 26% between 10 and 19, 17% between 20 and 29 and 15% were for more than 30 years, which supports the idea of Catalan festivals as generally younger when compared to the European ones.⁵²

It is interesting to remark that in the Catalan case the connection between the genre and the age of the festival is not as strong as in the rest of Europe. In Europe, the first contemporary festivals were mainly devoted to classical music, which is why the average age of these festivals is the highest, while rock/pop festivals were the last to arrive and are generally the youngest. In Catalonia, however, the majority of music festivals started to emerge at the same time, during the 80s, and festivals of all genres still appear nowadays, which has made the connection between genre and age of the festival weaker.

The effects of the economic crisis

The period 2008-2015 was especially rough for the music sector in Catalonia for several different factors. The industry was already in a bad position because of the technologic reconversion, which was forcing it to change its whole structure, and the economic crisis only made things worse with the generalized decrease in sales (album and tickets sales) and the imposition of harmful fiscal policies.⁵³

Like most southern European countries, Spain decided to reduce the investment on culture in order to face the crisis. There was a decrease of 35% in institutional investment on culture in Spain, and a 15% in Catalonia. This reduction was even more marked for the music sector, which lost a lot of its importance inside cultural industries and had an institutional investment reduction of 21%. The Government of Catalonia, for example, reduced its spending on music in a 60,5%, while the general decrease on cultural investment amounted to 39%. In 2015, music only represented a 12,7% of the cultural budget (27,6 million of the 217,4 million invested on culture), while at the start of the economic crisis, in 2008, it represented a 19,6% (70 million of the total 356 million).⁵⁴

This context has been particularly damaging for the Catalan record industry, which has reached historic lows and can't seem to compete in the globalized model of digital distribution. Music

⁵² "Catalunya, País De Festivals" (Institut Català de les Empreses Culturals, 2015), p. 10

⁵³ *Anuari de la Música 2017'* (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 9

⁵⁴ *Anuari de la Música 2017'* (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 10

festivals have also been severely affected by the crisis, and most of them have suffered budgetary instability in this period, mainly because of the decrease in public funding and tickets sales, as well as the instability in their relationship with sponsors and the painful effects of the 21% VAT for live performances (reduced to a 10% in July of 2017).⁵⁵

All festivals had to do changes in order to adapt to the crisis, but the situation was much harder for small festivals, which compose the majority of the Catalan festival landscape and suffered budget reductions that often forced them to change their format, reduce the amount of performances or cease their activity altogether. Most medium-sized festivals have been able to survive the crisis, although they have had to adapt to the new situation as they have generally seen their budget and audiences reduced during the recession period.⁵⁶ Some examples of festivals that found it difficult to survive to the crisis are Festival de Música Clàssica de Sant Fruitós de Bages (1995), Festival de Músiques de Torroella de Montgrí (1981) and Festival de Cadaqués (1970), while others like Cambrirock (2003-2011)⁵⁷, and Summercase (2006-2008)⁵⁸ disappeared from the landscape.

Bigger festivals like Primavera Sound and Sonar, on the other hand, have more stable relationships with their sponsors and audiences, which make up the major part of their budgets. Their international reputation has allowed them to attract foreign audiences, and the increase of popularity of music festivals as leisure options in the last years has allowed them to grow in size (budget and audience), even with the economic crisis and the harmful fiscal policies.⁵⁹ Primavera Sound, for example, had a budget of 3,7M€ and 59,129 audience members in 2008, while in 2015 these figures were 11M and 195,000 respectively, whereas Sònar presented a 78% increase in budget (from 4,38M to 7,8M) and a 15% increase in audience during the same period.

Financing of Catalan music festivals

Despite the difficult relationship between music festivals and the public sector in Catalonia in recent years, public subsidies are still essential for most of them, especially the smaller ones, which commonly have more difficulties to attract sponsors and sell tickets. According to the report '*Catalunya, País de Festivals*', in 2015 30% of the festivals were of public nature, which indicates that they were either organized by municipalities, financed mainly by public funds or that they received a subsidy linked to cultural value. This figure varies considerably depending on the genre,

⁵⁵ *Anuari de la Música 2017'* (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 42

⁵⁶ *Anuari de la Música 2017'* (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 50

⁵⁷ "La crisis acaba con los festivales de música de Cambrils y Ascó." (Casas, Laura. *La Vanguardia*, 2012)

⁵⁸ "La crisis fuerza la suspensión del festival Summercase" (*Hidalgo, Luís. El País*, 2009)

⁵⁹ *Anuari de la Música 2017'* (Special issue of Enderrock magazine, coedited with ARC, 2017), p. 50

representing a 41% for classical and world-traditional music festivals, while in the case of rock/pop, jazz/blues and multi-style it represents only 17%, 18% and 23% respectively.⁶⁰

We find public funding at four different levels: state, regional, provincial and local. At state level, the Ministry of Education, Culture and Sports offers two grants: Aid for action and cultural promotion (total of €1,400,000) and Aid for music, poetry and dance (total of €6,047,952)⁶¹. At regional level, the entity in charge of providing grants is the Institut Català de les Empreses Culturals (ICEC), which also offers two types of grants: grants to music festivals (total of €2,660,000) and refundable contributions to festivals and music cycles (total of €529,355 €)⁶². At provincial level, there are several grants provided by the provincial councils of the four Catalan provinces. In the case of Barcelona, for example, we find subsidies for fairs, exhibitions, markets and festivals of reference (€370,000), subsidies for privately managed festivals (€150,000) or subsidies for popular and traditional culture (€450,000)⁶³. Finally, at local level we find all those subsidies contributed by the city and town halls of the different municipalities. In the city of Barcelona, for example, there are several examples of grants that festivals can apply for, such as subsidies for district and city projects, activities and services (total of €5,124,200 for cultural activities), subsidies to support emerging artistic projects in the field of performing arts (maximum of €12,000 per event), or subventions for occasional artistic, literary, cultural or technological projects of interest to the city (total of €260,000), among others⁶⁴.

Despite the existence of these subsidies and their importance for the survival of many of the festivals, the Catalan model tends very clearly to private financing strategies, through private subsidies or, especially, sponsors. Sponsorship is the most important source of income for many festivals in Catalonia, along with ticketing revenues, and they have reached a point where they are indispensable for the survival of both small and big events.

To conclude this section, it should be noted that crowdfunding has become a very popular funding source in cultural industries at both European and Catalan level. In Spain there are a large number of platforms dedicated to the crowdfunding of cultural and musical projects, such as Verkami, Banded, Nvivo, or Montatuconcierto.com. This type of financing allows the events to obtain financing through small contributions from a large number of people interested in the project, who at the same time receive exclusive rewards in exchange for these contributions. This model has proven to work quite well in Spain for small and medium-sized festivals, contributing amounts that generally range from €5,000 to €15,000 to some of the festivals. On the Verkami platform,

⁶⁰ "Catalunya, País De Festivals" (Institut Català de les Empreses Culturals, 2015), p. 17

⁶¹ "Becas, ayudas y subvenciones de Industrias Culturales." (Ministerio de Educación, Cultura y Deporte, [Online: Mecd.gob.es] 2018)

⁶² "Tràmits per temes - Música." (Institut Català de les Empreses Culturals [online: icec.gencat.cat] 2018)

⁶³ "Subvencions de Cultura." (Diputació de Barcelona [online: Diba.cat] 2018)

⁶⁴ "Subvencions de l'any en curs." (Ajuntament de Barcelona [online: ajuntament.barcelona.cat] 2018)

for example, one of the most important in Spain for cultural projects, 73% of the projects that have applied have achieved their funding objective.⁶⁵

The economic impact of Catalan music festivals

It has been mentioned that festivals often work as economic drivers of their regions. Their capacity to attract audiences, which normally spend money on the territory where the festival is held (apart from the ticket to access it), has a positive economic impact in their regions, which is one of the most common arguments used by festivals when trying to obtain public funding.⁶⁶

Festivals do not need to be big events in order to work as economic stimulators. In fact, it is normal for small or medium-sized festivals to be among the events with more economic impact of the region they are held in. This is the case of Vida festival, for example, which had economic impact of 1,3 million euros in Vilanova i la Geltrú (the biggest among cultural events in the city) in 2015⁶⁷, or Banc Sabadell Vijazz Penedès, with an impact of 1,5 million euros in the region of Alt Penedès in 2016⁶⁸. Other examples are Porta Ferrada Festival, in Sant Feliu de Guíxols, Anòlia, in Igualada and Festival Internacional de Música de Cambrils, among many others.

In the case of big festivals, this impact can be really big, reaching multiplier factors up to 9.8. According to data provided by the Government of Catalunya in the dossier "Catalunya, País de Festivals" (2015), Sónar, Peralada, Cap Roig, Primavera Sound and Acústica, with a total of 1,066,675 spectators and a global budget of 31.2 million euros, generated an economic impact of more than 163.5 million euros in 2014⁶⁹. This value has surely increased during the last 3 years, since all these festivals have grown in size and reputation and also other festivals have reached significant sizes, like festival Cruïlla, Vida Festival, Festival Jardins de Pedralbes and Canet Rock.

In the case of the city of Barcelona, its tourist attraction significantly influences the number of foreign visitors that attend the big festivals, which is translated into greater economic impacts. Primavera Sound is the festival with the greatest economic, social and media impact. In 2017 the festival attracted more than 200,000 spectators, 55% of whom were foreigners⁷⁰. These visitors spend money in hotels, restaurants, transport and other services in Barcelona, as well as inside the festival site. According to the latest study on the economic impact of the festival, carried out by the consultancy firm Dentsu Aegis in 2014, its economic impact was calculated to be 95 million euros, with an average expenditure of 544€ per visitor, 780€ in the case of foreigners. This value

⁶⁵ "¿Funciona el crowdfunding cultural en España?" (Hernanz, Míriam, RTVE.es, 2012)

⁶⁶ "Music festivals, a changing world" (Emmanuel Négrier, Lluís Bonet, Michel Guérin, 2013), p. 222

⁶⁷ "Festival Vida genera un impacte econòmic directe d'1,3 milions d'euros" (Corporació Catalana de Mitjans Audiovisuals [online: <http://www.ccma.cat>] 2015).

⁶⁸ "L'impacte econòmic del Vijazz Penedès a la comarca ha superat els 1'5 milions d'euros" (La Vanguardia, 2016)

⁶⁹ "Catalunya, País De Festivals" (Institut Català de les Empreses Culturals, 2015), p. 24

⁷⁰ "Cifras de récord en el Primavera Sound con más de 200.000 asistentes" (EFE, 2017)

makes the festival one of the five events with more economic repercussion in the city of Barcelona. Besides, the festival generated 20 million euros in taxes for the administration in 2014.⁷¹ This impact is probably greater nowadays, given that the number of attendees has grown by 15,000 people.

A similar phenomenon takes place in Barcelona a couple of weeks later every year, with the start of Sónar festival. In 2017, this festival beat its record, attracting a total of 123.000 visitors, 52% of whom were foreigners from 105 different countries⁷². In 2016, Sónar estimated its economic impact at 72 million euros, although this figure can increase up to 124 million euros if we also take into account all the musical activity that takes place in the city thanks to the boost caused by the festival.⁷³

As for the third biggest festival in Catalonia, Acústica de Figueres, the most recent study on its economic impact revealed that the festival had an economic impact of 2,3 million euros in the Catalan GDP in 2017. Of these, 1.6 million euros were spent in Figueres, with an average of €32 per visitor spent principally in restaurants and hotels. Besides, 55% of the festival attendants are from Barcelona and Girona, which places this festival as one of the main tourist attractions of the city.⁷⁴

⁷¹ "Primavera Sound se erige como una cita musical de referencia." (Primavera Sound Festival [online] 2014)

⁷² "El Sónar 2017 bate su récord histórico de público" (Bianciotto, Jordi, El Periodico, 2017)

⁷³ "El Sónar y sus "satélites" aportan 124 millones al PIB de Barcelona" (EFE, 2016)

⁷⁴ "El festival Acústica de Figueres genera un impacte econòmic de 2,3 milions" (Europa Press, 2018)

VII. CASE STUDIES ON THREE CATALAN MUSIC FESTIVALS

In the study carried out in the previous chapters, we have been able to observe the features presented by music festivals in Europe and Catalonia in a broad sense. In this last chapter, I aim to describe the specific case of three Catalan music festivals, with the intention of translating the features previously found into the case of actual music festivals, which I hope will help to understand in a more explicit way the context in which these festivals have evolved to reach their present situation.

I have chosen to study festivals that present significantly different features, with the goal of illustrating some of the realities experienced by Catalan music festivals according to several variables, such as their genre, budget, location and history. I will start each of the analyses with a brief overview of the festivals' features, and then I will focus on their history and evolution. The festivals selected for the study are: Porta Ferrada Festival (1958), Festival de Música Clàssica de Sant Fruitós de Bages (1995) and Primavera Sound (2001).

Porta Ferrada Festival is a multi-style event held in Sant Feliu de Guíxols since 1958, which makes it the oldest active festival in Catalonia. In its study, I intend to analyze the birth of the first contemporary festivals in the region, as well as the stages that have described the history of cultural policies in Catalonia. The study will also reinforce the notion of a close relationship between tourism and music festivals, as well as the increasing tendency of Catalan festivals to be managed privately.

On the other hand, Sant Fruitós de Bages Clàssica Music Festival is a small festival, both in budget and number of attendees, which has been held in the Bages region since 1995, offering only 4 concerts per edition. Its study will show the reality of a large part of the festivals in Catalonia, which have limited resources and survive only thanks to the determination, effort and passion of their creators and workers. In the analysis I intend to show the real effects the economic crisis and the harmful cultural policies have had on a good part of the landscape, as well as to study their evolution and the trends they present.

Lastly, Primavera Sound is a festival devoted to rock/pop music and other associated genres that has been held in the city of Barcelona since 2001. It is the largest and most prestigious festival in the region, both in number of attendees and budget. In its study, I intend to analyze the evolution and stages that have described the growth and expansion of the festival, as well as the characteristics that define it, the challenges it has encountered and the factors that have determined its success.

Festival de la Porta Ferrada (1958)

Festival de la Porta Ferrada is a multi-style music festival held annually during the months of July and August in Sant Feliu de Guíxols, an important tourist centre located on Costa Brava. It is the oldest active music festival in Catalonia, with its first edition being held in 1958, in a Spain that was still under the dictatorship of Francisco Franco. This festival, which was publicly organized until 2013⁷⁵, is the best example we have of how cultural policies have evolved in Catalonia during the last 60 years, and it is a representative case of the many circumstances that have made the history of contemporary music festivals in Catalonia (and Spain) different from the general European rule.

The history of this festival can be divided into 3 phases (1958-1970s, 1980s-1990s and 2000s-present), which I will be introducing after reviewing this festival's main features in the present (data from 2017).

FESTIVAL OVERVIEW⁷⁶

Genre: Multi-style	Budget: 1,4M€
Number of editions: 55	Audience members: 32.000
Format: 15 th July-18 th August (main activity), 20 concerts, 1-2 per day, normally on weekends during 21 days, audience around 30,000 members, 21-51€ per concert	Location: Esglesia del Monasteri (classical music), Teatre Municipal (theatre and acoustic concerts) and the outdoor space `Espai Port, where concerts of all genres are held.

FESTIVAL HISTORY⁷⁷

1958-1970s:

The massive arrival of European tourists to Costa Brava during the 1950s and 1960s caused a sudden and extreme urban transformation in the region. "For the first time after two war disasters

⁷⁵ "Sant Feliu de Guíxols treu a concurs el festival de la Porta Ferrada" (ACN ,2013)

⁷⁶ Own elaboration with information from Porta Ferrada festival official website [online: festivalportaferrada.cat] and "El Festival de la Porta Ferrada cierra con 32.000 espectadores" (Europa Press, 2017).

⁷⁷ Section based on "El Festival de la Porta Ferrada compleix 50 edicions" (L'Arjau -cultural magazine, n. 66, November 2012) p. 3-28

and a hard period of deprivation, Europeans felt a strong need for recreation and, in addition, the luxury of paid vacations could be afforded under the new social laws adopted by most Western countries⁷⁸. Spain was still under the dictatorship of Francisco Franco, a regime that had been sanctioned by the United Nations until 1950, and tourism became a driving force to change, a fundamental element in the modernization programme that allowed the regime to survive and served as a factor of legitimacy, leading Spain to become a symbol of the European leisure civilization.⁷⁹

Costa Brava, one of the favorite touristic destinations because of its good weather, stunning beaches and enormous beauty, underwent a huge urban transformation, and hundreds of hotels hastily appeared on the Catalan coast, turning those idyllic beaches into a cold and dehumanized landscape. Several local councils decided then to invest on the creation of classical or folk music festivals, in an attempt to compensate for that increasing dehumanization and attract more visitors, while also serving to promote the "typism" built by the dictatorial regime.⁸⁰

One of those events was Porta Ferrada festival, which had its first edition on August 13 1958 with a single concert in Plaça del Monestir, and was organized by the *Junta Local de Informació, Turismo y Educación Popular* (Local Board of Information, Tourism and Popular Education), presided by the town's major Joan Puig i Ametller. The celebration was quickly linked to the town's *Festa Major*, and it was held more or less regularly during the following years under several different names, such as *Festival de la Música Catalana*, *Festival Estival de Música* or *Festival de Música Simfònica a la Porta Ferrada*. There is not much documentation about these first editions (there is no record of the event even taking place in some years, such as 1966, 1967 or 1971), although we do know that its first editions presented programs from 1 to 3 performances of classical, baroque and romantic authors⁸¹.

This situation lasted until late 1970s, when the transition to democracy caused a radical change in cultural policies and festivals became popular goods and claims for cultural tourism.

1980s-1990s:

Spanish cultural policies changed radically during the democratic transition, and many new cultural activities were promoted in order to satisfy the citizens. During the 1980s many permanent theatre, music and dance programs were developed, and the 1990s were characterized by the construction of multiple cultural infrastructures that sought to consolidate the creative industries and cultural consumption in the country. Several festivals emerged in

⁷⁸ "El Festival de la Porta Ferrada compleix 50 edicions" (L'Arjau -cultural magazine, n. 66, November 2012) p. 19

⁷⁹ Pack, S. (2006). *Tourism and dictatorship*. Palgrave Macmillan.

⁸⁰ "El Festival de la Porta Ferrada compleix 50 edicions" (L'Arjau -cultural magazine, n. 66, November 2012) p. 17-20

⁸¹ "El Festival de la Porta Ferrada compleix 50 edicions" (L'Arjau -cultural magazine, n. 66, November 2012) p. 22-28

touristic regions, often supported by both the public and private sectors, and these tended to promote internationally renowned artists, interculturality and the Mediterranean tradition.⁸²

Initially, the festival was still focused on the classical and folk genres, offering short programs with performances by orchestras, classical music bands or opera singers. In 1983, its XXI edition, the festival was organized for the first time by the *Juventuts Musicals* from Sant Feliu de Guíxols, and it began to receive support not only from the city council, but also from the *Generalitat de Catalunya* and the *Diputació de Girona*. These contributions allowed the festival to create longer programs (which ranged from 6 to 17 concerts), that soon became more heterogeneous, with the progressive addition of different genres' performances to the line-up, such as *sardanes*, *copla*, jazz and even pop⁸³.

The festival soon became the main cultural activity during summers in the municipality of Sant Feliu de Guíxols, and it started gaining importance and recognition as the years passed, growing in audience and number of performances. The festival was at that time one of the most outstanding of the Catalan ecosystem, thanks to its diversity and antiquity, and it soon got the attention of the private sector, which saw an opportunity for sponsorship and patronage strategies in it, allowing the festival to improve its budget as well.

2000s to the present:

The current economic circumstances prevent festivals from enjoying the type of subsidies they had in the past, and nowadays all expenditures require full justification. As we have seen in the previous chapter, the crisis caused Spain's investment on culture to decrease dramatically, while it also made it more difficult for festivals to attract crowds. Luckily, festivals like Porta Ferrada, which offer performances of many different music genres and are aimed at attracting visitors and tourists, have the support of both the public sector (that sees them as an investment to stimulate the economy of the territory) and the private sector (that sees them as an opportunity to position themselves). This allowed the festival to continue its activity with the same format even during the recession, although it was not easy for it to adapt to the new context.

Porta Ferrada festival enjoyed a continuous growth and was in very good shape until 2008, when it had a budget of around 1,4 million euros (42% from public funding, 20% private funding and 38% ticket revenues)⁸⁴. However, the festival was soon affected by the crisis, and in only one year both public and private contributions to the festival were drastically cut, leading the festival to a loss of about 400,000 euros of its budget with respect to the previous year.⁸⁵ It stopped the

⁸² "El Festival de la Porta Ferrada compleix 50 edicions" (L'Arjau -cultural magazine, n. 66, November 2012) p. 6-11

⁸³ "El Festival de la Porta Ferrada compleix 50 edicions" (L'Arjau -cultural magazine, n. 66, November 2012) p. 24

⁸⁴ "Presentat el 46è Festival de la Porta Ferrada de Sant Feliu de Guíxols" (ACN, 2008)

⁸⁵ "Porta Ferrada afronta una nova edició malgrat perdre un 30% del pressupost" (ACN, 2010)

continuous growth that had characterized the festival until that moment, forcing it to adapt its program to the new situation and to put a lot of effort in maintaining its quality.

During the following years, the budget of the festival continued to be severely affected by the crisis (950,000 euros in 2011 and 600,000 euros in 2013, for example)⁸⁶, but the festival's historical importance and good positioning allowed it to continue attracting significant audiences, serving as an economic stimulant for the municipality of Sant Feliu de Guíxols. In 2011, it was calculated that the impact of the festival on the hotels and restaurants of the municipality amounted to about 50,000 euros, while its impact on the media had an approximate value of 750,000 euros, the equivalent to an advertising campaign⁸⁷. Those were the reasons why the council had continued its collaboration with the festival, which was one of the very few municipally organized big festivals in Catalonia.

However, the festival still generated a deficit of 400,000 to 600,000€ to the council, which is why the situation soon became unsustainable. The council decided to delegate the organization of the festival to a private company in 2013, mainly in order to professionalize it while limiting municipal investment. The council decided to tender the festival for one year, pledging to contribute 400,000€ to its organization as long as it was integrally carried out by the chosen private company, as a trial to see the results obtained with a private management.⁸⁸

The company elected was Bitó, a business from Girona devoted to cultural management that had experience organizing festivals, and the results of the year were good, with an attendance of 91% of the festival's capacity⁸⁹, which led the council to tender the festival again, this time for a 4 years contract. This second time, the company elected was The Project in collaboration with El Terrat, a group chaired by humorist Andreu Buenafuente, which have been in charge of the festival since 2016⁹⁰.

The transition to private management has led the festival to improve considerably its communication strategies, bringing the festival closer to its actual and potential audiences, and allowing the festival to grow in audience size and, hence, in benefits from ticketing, which also translates into more interest from the private sector. All of this has allowed the festival to enjoy budgets similar to those prior to the crisis in the current years: 1.3 million euros in 2016 (35% contributions from public administrations, 10% from sponsors and the rest from the 32,250 tickets

⁸⁶ "La Porta Ferrada es replega per fer-se sostenible" (Serra, Laura. Diari ARA, 2013)

⁸⁷ "El Festival de la Porta Ferrada compleix 50 edicions" (L'Arjau -cultural magazine, n. 66, November 2012) p. 6

⁸⁸ "La Porta Ferrada es replega per fer-se sostenible" (Serra, Laura. Diari ARA, 2013)

⁸⁹ "El festival de Porta Ferrada cierra con 11.100 espectadores y un 91% de ocupación" (Europa Press, 2013)

⁹⁰ "The Project gestionarà el festival de la Porta Ferrada de Sant Feliu de Guíxols els pròxims quatre anys" (ACN, 2014)

that were were put up for sale)⁹¹ and €1.4 million in 2017, partly as a result of the tax reduction in the cultural VAT.⁹²

These figures have brought the festival back to a stage of growth, which has allowed it to enrich and improve its program. At this time, the festival offers a cycle of classical music concerts in the Església del Monasteri, theater functions and acoustic concerts at Teatre Municipal, a large number of varied genre performances at the outdoor spaces 'Espai Port' and Guíxols Arena⁹³.

Festival de Música Clàssica de Sant Fruitós de Bages (1995)

Festival de Música Clàssica de Sant Fruitós de Bages is a small festival devoted to classical music that takes place every Thursday in July in the Bages territorial district since 1995 (23 editions). The festival, despite offering just 4 concerts that are attended by small audiences (generally between 200-600 members) and having a budget that has never surpassed the 80,000 euros, has managed to make a name for itself in the Catalan and Spanish ecosystem.

It is a good example to present the format followed by many festivals devoted to classical music both in Catalonia and Europe, with small audiences, generally reduced budgets and programs that extend over time but offer small amounts of concerts. In addition, this festival serves to exemplify some of the difficulties that such festivals suffered in the countries most affected by the economic recession of 2008.

As in the previous case, I will review the history of this festival and the many circumstances that have brought it where it is now after introducing the main features that describe it in the present.

FESTIVAL OVERVIEW⁹⁴

Genre: Classical music	Budget: 40,000€
Number of editions: 23	Audience members: >1000
Format: 6-27 th July, 4 concerts on Thursdays, small crowds, 70€ full festival ticket, 20-30€ for single concerts	Location: Món Sant Benet (Jardi dels Arcs and La Fàbrica)

⁹¹ "Vells amics, nous duets" (El Punt Avui, 2016)

⁹² "Porta Ferrada presenta una programació eclèctica amb una vintena d'actuacions" (ACN, 2017)

⁹³ "Espacios" (Festival Porta Ferrada [online: festivalportaferrada.cat] 2018)

⁹⁴ Own elaboration with information from Festival de Sant Fruitós official website [online: festivalsantfruitos.com] and "Ainhoa Arteta serà el plat fort del festival de Sant Fruitós" (Regio7, 2017)

FESTIVAL HISTORY

1995-2000⁹⁵

The idea to create the festival arose after a concert played by the mezzosoprano Mireia Pintó (resident of the town) and her husband, the Russian pianist Vlavislav Bronevetzky, at the parish of Sant Fruitós in 1994. The great reception this concert had, along with the gap that existed in terms of cultural offer in the region, prompted the town hall of Sant Fruitós de Bages to create a summer festival to bring classical music closer to the residents. They put the condition that the singer Mireia Pintó would collaborate in its organization and offer a concert in every edition.

The first two editions of the festival, in 1995 and 1996, were held in the same parish church as that precursory performance, with short programs that began to shape the event and a great collaboration with the town hall. For its third edition, the festival was held at Monastery of Sant Benet, a great historical site and tourist center of the region that provided great value to the event. It was then decided for the concerts to take place on Thursdays, a successful decision considering the tendency of residents of the central areas of Catalonia to leave their homes and go to the sea or the mountains on the weekends of the months of summer.

These first editions, with few concerts and characterized by the changes presented in each edition as the festival adapted to the ecosystem, facilitated the progressive birth of a group of classical music fans in the region, which soon took charge and shaped the festival the way it is nowadays.

2001-2007⁹⁶

After the birth stage of the festival, the stage of growth started. In 2001, those classical music enthusiasts who had appeared with the first editions of the festival grouped together and formed the Memorial Eduard Casajoana Association, which has been in charge of the festival ever since. This association worked really hard to make the festival closer to people, focusing on giving quality to the program, and also on attracting sponsors to help the event achieve more competitive budgets. In that same year, some construction works in the Monastery of Sant Benet forced the festival to change of venue and move to Mas de Sant Iscle, an outdoor space that can accommodate 300 to 500 people, where the event was held for 15 years.

During these years the festival was in a good position, and it began to adopt the format that it has followed so far: 4 concerts, each one on a Thursday of the month of July. With the help of public subsidies and private sponsors, the festival managed to end up settling in the ecosystem.

⁹⁵ Based on information from the pages "*Presentació*" and "*Organització*" (Festival de Música Clàssica de Sant Fruitós de Bages [online: festivalsantfruitos.com])

⁹⁶ Based on information from the page "*Organització*" (Festival de Música Clàssica de Sant Fruitós de Bages [online: festivalsantfruitos.com])

It attracted people from different regions of Catalonia and enjoyed considerable stability, which was facilitated by the economic situation of the time. At the end of this period, the festival had budgets around €64,000, which were invested mainly in artistic and administrative costs.⁹⁷

However, the age, prestige and history of the festival could not prevent it from having a very hard time trying to survive the economic crisis that started in 2008, which led the governments to dramatically cut subsidies in culture while the relationships between sponsors and festivals became much more unstable. These factors altered a lot of festivals' budgetary stability, forcing them to make changes in their programs in order to survive.

2008 to the present

After the birth and growth stages, the festival had to undergo a survival period, similar to what most Spanish small and medium-sized festivals experienced. Public subsidies, although they were rarely completely cut, were reduced very significantly, and many sponsors broke their relationship with the festivals, while finding new ones became a very difficult task.

In the case of the festival of Sant Fruitós de Bages, the crisis began to affect it in 2009, when a 30% reduction of the budget left it at €40,000.⁹⁸ In spite of the unfavorable conditions, the festival decided to keep the format of 4 concerts and continued looking for quality, which was possible thanks to the name the festival had made in the previous years, the collaboration of certain sponsors and the kindness of the artists, which in many cases reduced their fees in order to offer their concerts.⁹⁹

The situation remained complicated during the following years, and the budget continued to decline slowly due to subsidy cuts and the instability in the relationship with sponsors. The festival managed to survive, even after reaching a critical point with a budget of less than €35,000 in 2013 (9,000 contributed by the council and the rest by about 20 sponsors) It never stopped betting on quality and it kept the same the format in spite of the difficulties, filling it mainly with national artist who often had to reduce their fees.¹⁰⁰

In recent years, the situation has improved thanks to new contributions from sponsors, which add up to a total of 28 today. Among these sponsors we find several local companies (Nat's, Distribuidora Joan, Denso, Time Spa) and some multinationals and big companies (CaixaBanc,

⁹⁷ "L'entrada de nous patrocinadors permet al Festival de Sant Fruitós mantenir el pressupost del 2009" – Interview with Rosa Sanfeliu, President at Associació de Música Clàssica Sant Fruitós (Regió7, 2010)

⁹⁸ "L'entrada de nous patrocinadors permet al Festival de Sant Fruitós mantenir el pressupost del 2009" – Interview with Rosa Sanfeliu, President at Associació de Música Clàssica Sant Fruitós (Regió7, 2010)

⁹⁹ "Mireia Pintó ens parla del Festival de música clàssica a Món Sant Benet" – Interview with Mireia Pintó (Altra Cara, 2017)

¹⁰⁰ "El festival de música de Sant Fruitós retalla el pressupost" (ACN, 2013)

BBVA, Tous, Toyota or Schwarzkopf).¹⁰¹ Their contributions have allowed the festival to recover slightly, presenting budgets of €38,000 in 2016¹⁰² and €40,000 in 2017¹⁰³ (partly thanks to the reduction of the cultural VAT, as in the previous case).

The festival still counts on the support of the municipality of Sant Fruitós de Bages, which contributed €11,000 in the last edition, as well as on subsidies from Diputació de Barcelona and Generalitat de Catalunya¹⁰⁴. In addition to the economic recovery, the association signed an agreement with the town's municipality and the Foundation Catalunya-La Pedrera in 2016, which allows the event to re-occupy two spaces of the Món Sant Benet complex¹⁰⁵. This is an important step forward, given the patrimonial importance of the venue and the opportunity to improve the event this change supposes, allowing festival attendees to visit the complex or even spend the night.

Primavera Sound Festival (2001)

Primavera Sound is the largest music festival in Catalonia, both by budget and by number of attendees. As expected, this festival is mainly dedicated to rock/pop and other popular genres, such as hip hop, electronic music or rap, and it has attracted crowds of more than 200,000 people in recent editions.

The main activity of the festival is held annually at Parc del Fòrum for 3 days (Thursday, Friday and Saturday) during the spring, plus a free day (Wednesday), although the festival also organizes a large number of activities and live performances throughout the year that take place in many different spaces.

The main defining feature of the festival is the large number of artists that make up its program, more than 250 in recent years. A few of these are artists of great standing, and there are a large number of emerging artists' performances, who see this festival as a great opportunity to make themselves known. This feature has made Primavera Sound one of the favorite festivals both for bands and music lovers from around the world, who do not hesitate to travel from many different places to attend the event. These audiences are, on average, older and wealthier than those who attend other festivals devoted to the same genres (25-35 and 22 years, respectively)¹⁰⁶, and are mostly foreigners (60% in 2018, a 5% increase with respect to the previous year)¹⁰⁷, which leads

¹⁰¹ "Patrocinadors 2017" (Festival de Música Clàssica de Sant Fruitós de Bages [online: festivalsantfruitos.com])

¹⁰² "El Festival de Clàssica de Sant Fruitós tria Sant Benet" (El Punt Avui, 2016)

¹⁰³ "Ainhoa Arteta serà el plat fort del festival de Sant Fruitós" (Regio7, 2017)

¹⁰⁴ "Ainhoa Arteta serà el plat fort del festival de Sant Fruitós" (Regio7, 2017)

¹⁰⁵ "El Festival Internacional de Música Clàssica de Sant Fruitós de Bages es trasllada a Món Sant Benet – Notícies" (Festival de Música Clàssica de Sant Fruitós de Bages [online: festivalsantfruitos.com])

¹⁰⁶ Data from the study on the economic impact of the festival carried out by the consultancy firm Dentsu Aegis in 2014

¹⁰⁷ "El Primavera alcanza su cumbre con 210.000 espectadores" (Bianciotto, Jordi. El Periodico, 2018)

this festival to have a great economic impact on the city of Barcelona and to represent about 6% of the musical GDP of Catalonia¹⁰⁸.

After a quick overview of the situation of the festival in the present (with data from 2017), I will explain the different stages that have described its expansion since its first edition in 2001, with less than 20 bands and 8,000 attendees¹⁰⁹, to consolidate in the present as one of the most prestigious festivals of the world.

FESTIVAL OVERVIEW¹¹⁰

Genre: Rock/Pop	Budget: +12M€
Number of editions: 17	Audience members: 208,400 (55% foreigners)
Format: 1-4 th June (main activity), 281 bands in 28 stages, 192,000m ² , audience around 50,000 members per day, 215€ full festival ticket maximum price, 80€ day ticket	Location: Fòrum, Sala Apolo, Raval, civic centres and bars, among others

FESTIVAL HISTORY

2001-2004

Primavera Sound began its activity in 2001 with what the directors described as a "demo" where they intended to study the response the festival could have. They offered a program with less than 20 artists, which were scheduled in a single day in 6 different stages at Poble Espanyol (Barcelona). Previously, the directors had already worked very actively on the music scene in the city, organizing parties and concert cycles at different venues, especially Sala Apolo, which is closely linked to the festival.

In only one edition, the festival managed to double the figures of the previous year, welcoming 50 artists and 17,800 attendees, and these figures continued growing exponentially during the

¹⁰⁸ Data from the study on the economic impact of the festival carried out by the consultancy firm Dentsu Aegis in 2014

¹⁰⁹ "Primavera Sound Barcelona - Infografía." (Primavera Sound Festival [online: primaverasound.es] 2017).

¹¹⁰ Own elaboration with data from Primavera Sound official website [online: primaverasound.es] and "Cifras de récord en el Primavera Sound con más de 200.000 asistentes" (EFE, 2017)

following years, reaching 115 artists and 41,431 attendees in its fourth edition (2004)¹¹¹. At that time the festival had a budget of 1.6 million euros, which indicates that the festival was already, in such a short time, one of the largest in the region in terms of budget.¹¹²

In its short life, the festival had already established important relationships with the public sector and especially the private sector, taking the name Estrella Damm Primavera Sound in its third edition (name that would be kept until the 2009 edition) and collaborating with different media companies and organizations, such as radio3, Rockdelux or Catalunya Cultura¹¹³. From the beginning, the festival showed interest in offering activities beyond concerts in order to expand its offer, and soon Primavera Soundtrack Film Festival (2002) and the Recording Fair for Professionals (2003, with 30-40 stands) were launched.¹¹⁴

2005-2008

The great growth of the festival in its early years meant that Poble Espanyol, where they occupied 10,650m² with 9 stages in 2004, was set to become small soon. This fact led the festival to one of the most complicated and decisive moments in its history: the change of location to Parc del Fòrum, where it multiplied by 7 its territorial size, occupying an area of 75.408m².¹¹⁵ In spite of that, this growth was only real in terms of the extension occupied, given that the number of bands, stages and spectators in 2005 was very similar to the figures of the previous year. That edition, according to the directors, was like starting over, with myriads of complications and a negative result.¹¹⁶

During the following editions the festival grew slowly but progressively as it adapted to its new venue, reaching figures of around 60,000 attendees, 160 artists, 92,879m², 12 stages and a budget that exceeded 3 million of euros in 2008.¹¹⁷ The festival's international reputation grew during those years, to the point that 45% of the attendees were foreigners by 2008.¹¹⁸

Although the change of venue slowed down the growth rate of the festival during this period, the Primavera Sound brand did grow in other ways. In 2006 Primavera Club was launched, a winter festival held in concert venues in Barcelona that focused on emerging national and international bands. This event continued to be celebrated during the following years, and in 2008 it was held simultaneously in the cities of Barcelona and Madrid. In addition to that, that year they also

¹¹¹ *Primavera Sound Barcelona - Infografía.*" (Primavera Sound Festival [online: primaverasound.es] 2017)

¹¹² "The Pixies y el debut de Wilco en España, en el Primavera Sound" (EFE, 2004)

¹¹³ "Primavera Sound Barcelona – Carteles" (Primavera Sound Festival [online: primaverasound.es] 2017).

¹¹⁴ "Dossier de Premsa Primavera Sound 2017" (Primavera Sound Festival, 2017), p. 33

¹¹⁵ "Primavera Sound Barcelona - Infografía." (Primavera Sound Festival [online: primaverasound.es] 2017)

¹¹⁶ "Entrevista a Gabi Ruiz. Primavera Sound" (Carrillo, Santi. Rockdelux, 2013)

¹¹⁷ "Primavera Sound Barcelona - Infografía." (Primavera Sound Festival [online: primaverasound.es] 2017)

¹¹⁸ "El festival Primavera Sound 2008 reúne en Barcelona a 59.300 asistentes" (Europa Press, 2008)

offered for the first time free concerts during the days before the festival, a tradition they have kept so far.¹¹⁹

The Record Fair also continued taking place during all those years, and in 2007 Minimúsica was born, a set of concerts directed to children and played by independent Catalan bands that have taken place in the free kindergarten of the festival during the dates of the event ever since.¹²⁰

In 2008 more initiatives were launched, such as Primavera al Metro (which offered free concerts at the Clot, Universitat and Passeig de Gràcia metro stations), Primavera al Parc (with free concerts during 2 days at the Joan Miró park), and also the Primavera als Clubs (with concerts that take place at different venues in Barcelona on the dates prior to the festival and which can only be attended with the Primavera Sound festival ticket).¹²¹

2009-2012

In the period from 2009 to 2012 the festival experienced a new growth and expansion stage, thanks to the establishment of new relationships with sponsors. In 2010, the festival took the name San Miguel Primavera Sound, and in 2011 Ray-Ban and Adidas started their collaboration as main sponsors of the event (which they still are), along with many other brands and media that took interest in the event, such as Jack & Daniels, Pitchfork, etc.¹²²

In 2010, the festival was attended by more than 100,000 audience members, and it already occupied an area of 141,465m², with 14 stages and 193 bands.¹²³ In addition, Primavera Pro was created that same year, a simultaneous event to Primavera Sound for professionals of the music industry held at CCCB and some areas of Forum, where debates, networking sessions, conferences, showcases and even some concerts have taken place every year since. Also in 2010, the festival launched Primavera als Bars, a series of free and small format concerts held at different bars in Barcelona during the month of May.¹²⁴ The festival invests all the public funding it obtains (which represents about 2% of the total budget) on this type of parallel activities, which aim to boost the music sector in the Catalan capital.¹²⁵

The festival continued its expansion during the following years. In 2012, the event had a budget of €7.5 million¹²⁶ (€6.1M in 2011)¹²⁷ and attracted 147,000 attendees, almost twice as much as

¹¹⁹ "Dossier de Premsa Primavera Sound 2017" (Primavera Sound Festival, 2017), p. 28

¹²⁰ "Dossier de Premsa Primavera Sound 2017" (Primavera Sound Festival, 2017), p. 29

¹²¹ "Dossier de Premsa Primavera Sound 2017" (Primavera Sound Festival, 2017), p. 28

¹²² "Primavera Sound: Anatomía de un evento" (Aliai, Francesca, Eventos Magazine, 2011) p. 75

¹²³ "Primavera Sound Barcelona - Infografía." (Primavera Sound Festival [online: primaverasound.es] 2017)

¹²⁴ "Dossier de Premsa Primavera Sound 2017" (Primavera Sound Festival, 2017), p. 25

¹²⁵ "Un negocio floreciente" (Suñé, Ramon. La Vanguardia, 2014)

¹²⁶ "El Primavera Sound prevé crecer hasta los 150.000 visitantes en 270 conciertos" (El País, 2012)

¹²⁷ "Los festivales salvan el negocio musical" (El País, 2011)

in 2009, with 255 bands that played in 16 different stages, occupying a surface of 145,720m².¹²⁸ In addition to the huge growth of the festival during this period, 2012 was the year of birth of Nos Primavera Sound, a clone festival that has been held for 6 editions at Parque da Cidade (capacity of 30,000 people per day), Oporto, whose lineup is made up by some of the bands from the main festival's program¹²⁹. Other initiatives such as Primavera al Parc and Primavera a la Ciutat gained more importance in this period, welcoming a greater number of attendees each year.

2013-2017

In the recent years, Primavera Sound has continued growing at a dizzying rate, expanding in very different ways and engaging in a large number of activities and projects. As for the main festival, it was attended by 170,000 people in 2013 (70,000 more than in 2010 and almost 100,000 more than in 2009), and this figure exceeded 200,000 people in 2016 and 2017¹³⁰. It is worth to remark that, in the present, the number of foreign visitors to the festival exceeds the number of national attendees (55% - 45% in 2017, 60% - 40% in 2018)¹³¹, a great indicator of its enormous international prestige. As for the number of artists, the festival has presented lineups with more than 250 bands in recent years (292 in 2014, 250 in 2015, 274 in 2016), which perform in more than 20 different stages¹³². In 2012, the festival budget was close to 10 million euros, and in its last edition (2017) the festival broke all its records with a budget above 12 million euros.¹³³

Aside from the great growth experienced by the main event, Primavera Sound has continued creating new initiatives aimed at boosting the music sector in Catalonia. In that sense, 2013 was a very busy year. El Segell del Primavera was founded, a label for emerging and consolidated artists that produces, markets and distributes their records while coordinating tours and concerts for them. In addition to that, that same year Primavera opened a physical store in Barcelona's Born district, La Botiga del Primavera Sound, where they sell products and vinyl records for music lovers and hold some concerts and music sessions¹³⁴. To that we can also add Primavera Sound Touring Party, which was a reality show that aired daily on Primavera Sound's online channel, showing the on-tour life of 11 national and international bands that were touring Spain, England and France, although it was only produced on that occasion¹³⁵. For the first time since its creation in 2006, Primavera Club festival was not held in 2013, due to the increase in the Spanish VAT and the accident suffered in Madrid Arena the previous year, where 5 people died, and the

¹²⁸ "Primavera Sound Barcelona - Infografia." (Primavera Sound Festival [online: primaverasound.es] 2017)

¹²⁹ "Dossier de Premsa Primavera Sound 2017" (Primavera Sound Festival, 2017), p. 13

¹³⁰ "Primavera Sound Barcelona - Infografia." (Primavera Sound Festival [online: primaverasound.es] 2017)

¹³¹ "El Primavera alcanza su cumbre con 210.000 espectadores" (Bianciotto, Jordi. El Periodico, 2018)

¹³² "Primavera Sound Barcelona - Infografia." (Primavera Sound Festival [online: primaverasound.es] 2017)

¹³³ "Cifras de récord en el Primavera Sound con más de 200.000 asistentes" (EFE, 2017)

¹³⁴ "Dossier de Premsa Primavera Sound 2017" (Primavera Sound Festival, 2017), p. 13

¹³⁵ "Primavera Sound Touring Party" (Primavera Sound Festival [online: primaverasound.es], 2013)

consequent excessive demand in terms of safety. The festival was held again in Barcelona in the next edition (2014), but it did not return to Madrid until 2017.¹³⁶

Other initiatives have also been launched in recent years. For example, Primavera als Barris started in 2015, and it offers free concerts in civic centres, halls and other spaces located in different neighborhoods of Barcelona such as Gràcia, Clot, Sant Adrià or Baró de Viver. There is also Primavera al Raval, which offers free concerts at the emblematic Centre de Cultura Contemporània de Barcelona (CCCB) on the same dates as the main festival since 2016. In 2017, Primavera a Casa Teva was launched in collaboration with Adidas and Sofar Barcelona, an initiative that offered 5 concerts by international bands to be played inside private homes, in a very intimate format.¹³⁷

At this moment, Primavera Sound is the largest and most popular festival in Catalonia, as well as the one with the greatest economic impact. In 2014 the agency Dentsu Aegis estimated that the economic impact of the festival during that edition was 94,8M euros, something that would place it among the five events with the greatest economic impact in the city of Barcelona. There are hundreds of companies involved in the organization of the festival, and its impact on the media is 8.7M euros¹³⁸.

¹³⁶ "*Primavera Club, regreso y sorpresa*" (La Razón, 2017)

¹³⁷ "*Dossier de Premsa Primavera Sound 2017*" (Primavera Sound Festival, 2017), p. 10

¹³⁸ "*Primavera Sound se erige como una cita musical de referencia.*" (Primavera Sound Festival [online: primaverasound.es] 2014)

VIII. CONCLUSIONS

The aim of the present thesis was to examine the history and main characteristics of music festivals in Catalonia and to assess the extent to which this model fits in the European framework. The main objectives were to create a non-exhaustive state of the art report on European and Catalan music festivals, evaluating their correspondence and establishing the main factors that set them apart. For this, the study has analyzed a variety of secondary sources, including book chapters, reports, surveys, statistics, monographs and journalistic reports, articles and interviews.

Through the study and comparison of the history and current features and trends of these two models, complemented by cases study on three remarkably different Catalan music festivals, this thesis has answered a set of key questions necessary to understand this diverse landscape, the most important being: (i) what is the historical context of European and Catalan music festivals, (ii) what are the features that define these events in the present time, (iii) what are the aspects that separate one landscape from the other and (iiii) what are the effects that recent phenomena such as the arrival of digital technologies, the economic crisis or the *festivalization* have had on music festivals.

The following paragraphs will be devoted to introduce the most significant findings to emerge from this study, although it is noteworthy to remark that the breadth of the topic and the multiple factors that affect these events make it difficult to draw general conclusions that describe this landscape in an accurate manner, as it is intrinsically heterogeneous.

The first conclusion shown by this study refers to the unprecedented stage of growth and popularity among audiences music festivals find themselves in, which has been facilitated by the new tourism and leisure trends and has led them to become the most popular and widespread cultural events in Europe. As already mentioned in the introduction, their demand in Spain can be compared to that of La Liga football matches, which gather an average of 35,649 attendees per game that can be compared with the 22.308 daily guests attracted by the 50 largest festivals in the country¹³⁹. These events employ thousands of people and commonly work as economic stimulators and key points in tourism strategies of the region where they are held, and the impact some of them have on the economy can be enormous, to the point that some of them, namely Primavera Sound (impact of 95 million euros in Barcelona in 2014)¹⁴⁰ and NOS Alive (impact of 50.2-55.3 million euros in Lisbon in 2016)¹⁴¹, are among the top-ranking events in terms of their

¹³⁹ "Más de 3 millones de espectadores en los festivales de música de 2015" (Blog Ticketea, 2016)

¹⁴⁰ "Primavera Sound se erige como una cita musical de referencia." (Primavera Sound Festival [online: primaverasound.es] 2014)

¹⁴¹ "The economic impact of Music festivals on the tourism economy. Nos Alive case study" (Paolicelli, Michela. Nova School of Business and Economics, 2017)

impact on their location. This shows that there is a need to break stereotypes in the academic world and to claim the prowess of these events and their economic and entrepreneurial capacity.

The second major finding shown by this thesis is closely related to the previous one, and it refers to the fact that this stage of growth and popularity, which has catalyzed the emergence of an abundance of festivals that aim to benefit from the media attention gotten by these events and their ability to work as economic stimulators, is by no means something local, but a European trend that includes both the Catalan and Spanish cases. This phenomenon is known as *festivalization* and it has led to a situation where there is an unprecedented number of festivals in the landscape, most of them small and medium-sized. While big festivals show a tendency to become larger and more popular due to this phenomenon, small events appear to be increasingly vulnerable in the growing ecosystem, which makes it difficult for them to settle.

This conclusion shows that Catalan festivals do fit in the European model. Festivals in both landscapes can be categorized according to the same criteria, find themselves in a similar stage and follow formats that present similar patterns and are especially influenced by the music genre. Needless to say, Catalan festivals are affected by a series of national and cultural circumstances that differentiate the ecosystem from the general European rule, among which should be highlighted: their geographical distribution, as festivals in Catalonia tend to be concentrated on touristic areas, their management models, since there is a clear tendency towards privately managed festivals, the size of the festivals, as Catalan festivals appear to be smaller both in terms of audience members and budget than their European counterparts and their funding, that shows that Catalan music festivals have a stronger dependency on sponsorship income.

It is also worth mentioning the different effect that the economic recession has had in these two landscapes, as it was predictably more severe in the Catalan case. In Europe, it is estimated that there are as many festivals whose budget increased during the crisis as ones that saw it reduced. In Spain and Catalonia, however, the institutional investment on music was severely reduced (a 21% and a 60.5% respectively), which led to a situation of budgetary instability that was worsened not only by the harmful effects of a 21% VAT for live performances, but also by the increasingly weakened relationships these events seemed to have with sponsors¹⁴². While some big festivals such as Primavera Sound or Sònar managed to become massive even in the harsh circumstances, most festivals found it hard to adapt to the new context and were severely damaged by the recession, which was especially tough on new and small festivals.

If we take a long-term historical perspective, as done in the study, we find the third major conclusion in the different motives why these contemporary events emerged and consolidated their position in Europe and Catalonia. In Europe, these events appeared progressively from the

¹⁴² "Anuari de la Música 2017" (Special issue of Enderrock magazine, coedited with ARC, 2017)

forties due to political reasons linked to the reconstruction of Europe and the efforts to maintain peace after World War II, and they evolved following a series of phases that responded to different objectives, such as the re-establishment of ties between countries, the encouragement of political and social change and their use as economic stimulators. In Spain and Catalonia, on the other hand, the emergence of these events also responded to political reasons, but these were linked to the reintegration of Spain to the European Economic Community in the decade of the 1980s, at the end of the dictatorship, and the economic openness and trade liberalization, which facilitated the flow of ideas and culture. Soon after that, the interest taken by the private sector added to the will of many municipalities to create festivals to stimulate the economy led to the appearance of a large number of festivals, which today make up a very heterogeneous landscape that fits in the European model and finds itself in the same stage.

Finally, this thesis has identified a last conclusion that refers to be great heterogeneity in the organization and impact of music festivals, derived from the several variables that affect them (the most significant being the genre they focus on and the budget they have) and the teams they have behind. According to their genre, these events can be broadly classified into classical music, rock/pop, jazz/blues, world-traditional and multi-style, and the differences in these genres' audiences and needs make them vary greatly from one another, to the point that other factors such as nationality, age or economic situation have a less significant influence on their features. When it comes to their budgets, diversity is also the main rule, and the figures range from less than €30,000 to several million (e.g. Roskilde festival -Denmark-, which had an operating budget of €26M in 2017)¹⁴³. Music festivals are business as well as culture and creation, and they are greatly affected by their organizers' networks and contacts, which lead them to support certain cultural agents and leisure trends that make each festival reflect the personality and creativity of the team they have behind and make each of them unique and original in the diverse landscape.

This study has found many limitations, the first and most noteworthy being the breadth of the content treated and the lack of reliable information on important indicators, such as the actual number of festivals in Europe and how they are divided according to their genre. This limitation exists due to the lack of quantitative studies about festivals, the lack of records of these events and the large number of variables that affect them, some of which have not been included in this project. Besides this, the fact that the festivals studied in one of the main sources of the project (the work *Music Festivals, a Changing World* (2013)) were chosen according to a series of criteria, such as the genre they are devoted to and their budget, has also limited the reliability of some data, although it was necessary to give consistency to other results (such as the budgets available to festivals, average ticket prices or number of attendants).

¹⁴³ "Fun Facts" (Roskilde Festival [online: roskilde-festival.dk] 2017)

Further research could usefully explore other variables that have not been considered in this study, such as the number of profitable festivals, their level of internationalization, the profile of their staff members, the level of collaboration between them and potential synergies, or to deepen on the repercussions the *festivalization* phenomenon has had on the landscape and to forecast the future of the ecosystem.

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