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Emmanuel Négrier, Lluís Bonet, Michel Guérin

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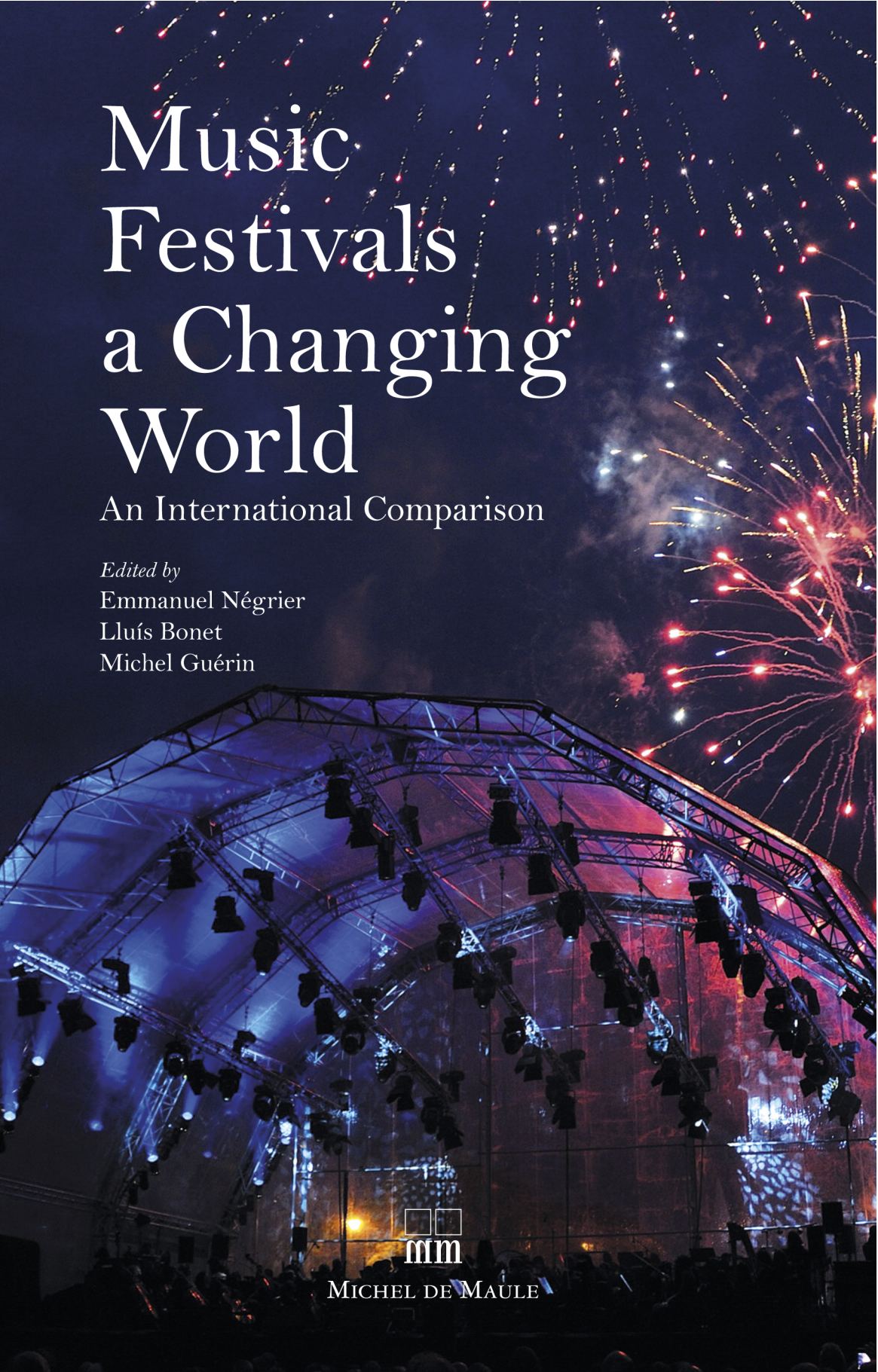
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Music Festivals a Changing World

An International Comparison

Edited by
Emmanuel Négrier
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Music Festivals, a Changing World

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Festival Berlioz



Opera på Skäret



Festival Musical de Namur



Festival International de Jazz de Montreal



Helsinki Festival




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Festival Internacional de Música y Danza de Granada



Vossa Jazz



Festival international des musiques sacrées de Québec



Klara Festival



Festival d'Île de France



Trondheim Jazzfestival



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— The Flemish Music Festival Association, represented by Jan Briers and Sophie Detremmerie;
— France Festivals, represented by Philippe Toussaint (President) and Bénédicte Dumeige (Director), associated with the networks developed by Afijma, now Jazzécroisé: Futurs Composés, Zone Franche, and De Concert!
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For additional information, please consult
http://www.festudy.com/fr/ressources

Preface

The co-publication of this work is the end result of a research project conducted over more than three years, jointly organized by Emmanuel Négrier (CNRS researcher – France), Michel Guérin (Director of the Cultural Policy Observatory of the Wallonia-Brussels Federation), and Lluís Bonet (professor at the University of Barcelona). The technical organization necessary for this research was provided by France Festivals, the French federation of festivals of music and performing arts.

This comparative study of music festivals was initiated by nine national associations of European festivals working within the European Festivals Association (EFA), later to be joined by the National Institute of Scientific Research (INRS) and the Ministry of Culture and Communications in Quebec. It is situated within a critical context for festivals.

Indeed, though festivals have become one of the major tools for European cultural policies, Europe has long lacked a basic shared understanding of the political, cultural, and artistic frameworks in which these events are developed.

Despite the work of a few early pioneers, it is only recently that festivals have become a major means of transmission for the performing arts. The festival phenomenon is multi-faceted, expressing its diversity in terms of festival esthetics, event size, the nature of public and private funding, and its multiple relationships with public cultural policy. This diversity has long been an obstacle for comparative studies of the festival sector.

Therefore, we have gone beyond the accumulation of monographic information concerning international festivals and have worked over a three-year period to pave the way for an integrated study, bringing together the representatives of national festival networks and their research teams. This long period of preparation has allowed us to establish a unique method for

collecting, processing, and analyzing data which, with a sample of 390 festivals, is unprecedented on the international level.

We would like to express our gratitude to our partners in this international cooperative project for their involvement in this novel undertaking. We hope that music festivals, their networks, and their public and private partners will be able to use the results of this study to strengthen their projects for development and cooperation to the benefit of their constantly changing audiences.

Philippe Toussaint
Co-Editor,
President
France Festivals

Frédéric Delcor,
Co-Editor,
Secretary-General of the Wallonia-Brussels Federation
President of the Cultural Policy Observatory

European Festivals Association (EFA): Arts matter!

Founded in 1952, the European Festivals Association (EFA) today represents 108 music, dance, theatre and multidisciplinary festivals, national festival associations and cultural organisations from 44 countries. EFA promotes festivals' important role in international cultural cooperation and societies.

The arts and culture – just as the sciences – are among the most rapidly changing fields in society. For the very simple reason that they are driven by artists: artists observe societal developments and present their reflections to the public which leads to new and renewed knowledge. Artists, through their artistic creations, and intellectuals, through their elaborations, have always been raising their voices on values leading to freedom, justice, peace and democracy.

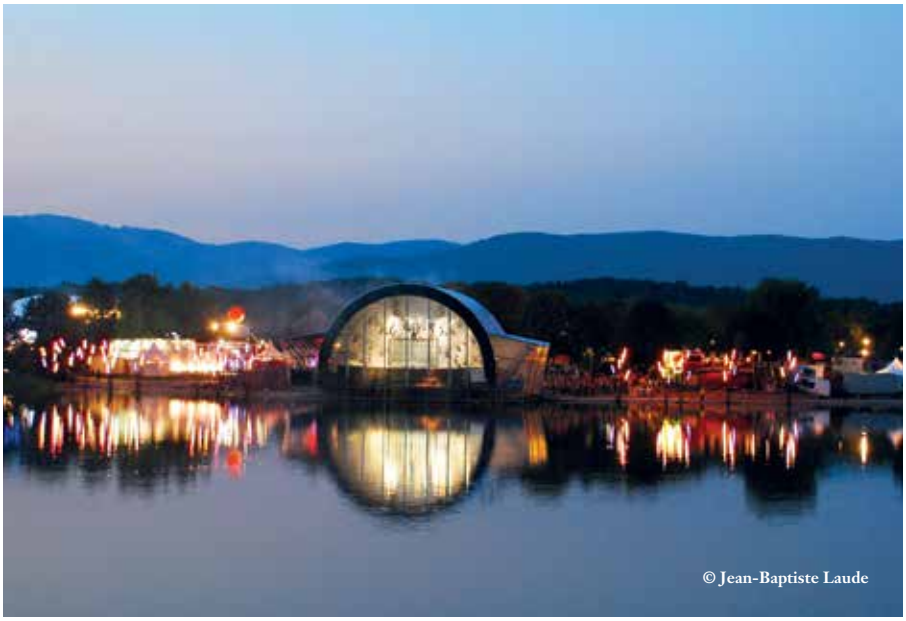
Despite a proliferation of arts festivals over the past 30 years, there is a lack of knowledge about them. There is a lot of evidence of the direct economic impact of festivals and cultural institutions. Despite new studies, there is less evidence of the total indirect impact of cultural participation on health, social skills and mental well-being which is likely to be much bigger than the already remarkable direct one.

EFA aims to trigger research in this direction and develop a "festival knowledge centre" useful for festival operators, researchers, the media, public funding bodies and potential sponsors through gathering studies, research papers etc. online. Furthermore, its EFA Books series and its blog Festival Bytes provide personal insight into the ins and outs of festivals. EFA believes in the need to provide for the exchange of knowledge between generations through its training programme Atelier for Young Festival Managers.

In particular EFA's national festival associations are joining forces with the research community. EFA and its members are looking forward to taking these efforts to the next level and continuing collaboration with researchers.

Darko Brlek
Président de l'EFA

Eurockeennes de Belfort



General Introduction

Prior to the present work, there have been no comparative studies of the international festival sector through a shared method of investigation. This is the first international comparative study of music festivals using a uniform style of investigation. This is not to say that comparative studies of festivals or, more generally, cultural policies have not been undertaken. On the contrary, regarding cultural policies, important progress has been made in the past few years, especially in terms of elaborating methodologies, expanding the number of fields being studied, and diversifying the approaches being used (Gray 2010). What might once have been seen as diplomatic relations has now become a domain of scientific exchange, with research projects now well-founded on the basis of statistical tools (Wiesand 2002). Even if a quantitative analysis can present certain risks (Belfiore 2004), it does allow us to consolidate a field of research and to support comparative projects on the economic aspects of cultural policies (Throsby 2010) as well as those addressing diversity (Bonet & Négrier 2008, 2011a). Nor have researchers neglected issues relating to how culture is governed, as we can see in recent publications. Two studies in particular can be cited for work carried out in contemporary history and the social sciences, both of which compare and synthesize research conducted within a national context. Claudine Audet and Diane Saint-Pierre (2009, 2010) have edited a two-volume study on the cultural policy trends and their tensions, particularly in terms of what they reveal about areas of international convergence and how they also continue to display national characteristics. Their work, which focuses principally but not exclusively on Francophone countries, has the advantage of transcending national borders while also examining sub-national dynamics and the roles played

by international institutions: the Council of Europe, the *Organisation internationale de la Francophonie* (the OIF), UNESCO, and the European Union (Audet & Saint-Pierre 2009). Shortly thereafter, Philippe Poirrier published a vast work on cultural policies throughout the world (Poirrier 2011). He was also interested in how we can identify shared values and common paradigms manifested by cultural policies as well as distinctive broad clusters. As Pierre-Michel Menger explains in the afterword to his study (Menger 2011), national models have all evolved along four axes, the first of which associates artistic excellence with democratization. Then we have the decentralization of political systems, followed by the emergence of the economy and market forces as constraints and as spheres of government intervention, and finally the contemporary trend toward reclassifying artistic issues as creative industry issues. However, these points of convergence exist on a very general level and do not stand in the way of contradictory government traditions, professional or bureaucratic inertia, or political configurations which maintain clear differences between different states or even within individual states.

For the purposes of our present study, this survey of recent research shows us that festivals have only been an incidental aspect of the research. This is doubtless because of the rather exceptional path they have followed within cultural policy history. Indeed, with the exception of a few isolated cases like the Festival of Avignon (Ethis 2002; Fabiani, Ethis & Malinas 2008), they have not been considered as a regular component of cultural policies. We can also explain this paucity of festival research through the relatively recent appearance of festivals on the cultural scene. The growth of the festival sector only took place during the last quarter of the 20th century, and the trend toward festival creation is still continuing, even in the context of the economic crisis beginning in 2008-2009. In light of this, it is understandable that there is relatively little empirical research on festivals before the 1990s. There are, however, a few exceptions, with work on festival management (Frisby & Getz 1989), cultural criticism (Boogaarts 1993) and in monographs (Négrier 1996, Goldblatt 1997, Frey 2000). Finally, we can explain this lack of research through the festival boom itself. The very diversity of these events has long made them difficult to classify as a sector or a domain unto themselves. Moreover, the festival field as a whole has only recently been structured by professional associations, and this configuration remains fragile. Studying such a fragmented sector often appeared to be overwhelmingly difficult, seemingly limiting research possibilities to monographs or highly specialized studies, such as those concerning classical music festivals – the most well-established events and those most recognized by public authorities.

In the middle of the last decade, however, this trend was entirely reversed, and a large amount of research specifically on festivals was published. This,

then, has allowed us to base our present study on an appreciable number of previous studies and to use these to formulate our research hypotheses. These hypotheses cover three different areas.

From scientific exclusion to academic curiosity

Our first hypothesis concerns how the festival form has changed, though national trajectories which might initially appear to be very distinct, and from artistic projects often closely tied to the personalities of the festival founders, through to an much more varied set of problems. As the anthropologist Alessandro Falassi said with prophetic verve, festivals tend to constitute elements of a "festive cycle, a series of events which, in other times and cultures, would have been more sharply circumscribed by clear spatial and temporal limits […] However, beyond these transformations, the festival has retained one of its unique qualities: that of celebrating *time out of time*" (Falassi 1987: p. 7). An historical approach is particularly useful in showing how, within several national contexts, the festival form incarnates the rise of a European society drawing simultaneously on three different sources: the circulation of artists, the mobility of a cultural and social elite, and, after World War II, the idea of Europe (Autissier 2008). Since the end of the 1970s, festivals have been growing at a seemingly unstoppable rate, even if this has varied from country to country. They have also become a tool for undertaking a variety of projects and a means of conducting research.

When we consider the current state of research on festivals, we can reach the following conclusions.[1] First, from the 1960s onward, this sector of research has grown considerably in Europe, particularly during two distinct periods: the end of the 1980s and the beginning of the 2000s. The timing of these periods is not accidental. If we take into account a delay between the phenomenon and the research dedicated to it, we can estimate that the first period corresponds to the first festival boom in Europe. We can also relate this robust growth to a period of growth in local powers, not only in countries with federal governments but also in those with centralized or regionalized governments. In Spain, Portugal, and Greece, this period overlaps with the renewal of local cultural life – partly illustrated by festival growth – and a return towards democracy. This first stage indicates the importance the territorial context has on the development of festival dynamics. The second stage coincides with the spread of the festival form as the "Swiss Army Knife" of the cultural sector. Indeed, it seems to have become a response to a wide array of issues, including cultural democratization, the legitimization of local powers (Watermann 1998),

1. We would like to express our gratitude to our research partners Tino Carreño and Aurélien Djakouane for their work in systematically reviewing the scientific studies conducted on festivals.

the transformation of artistic genres (Orosa Paleo & Wijnberg 2006), and cultural diversity and other concerns (Négrier 2013).

Research has also focused on how festivals can function as a lever for local economic development (Brancalente & Ferucci 2009; Colombo 2009; Gibson & Connell 2012). For festivals, this period is also when the first research was conducted on their economic impacts (Routhier & Cloutier 2002; Herrero, Lanza, Devesa, Bedate & Del Barrio 2002; Maughan & Bianchini 2004). It has generated arguments over methodology (Snowball and Antrobus 2002, Nicolas 2007) as well as concerns over the ambiguities or dangers of justifying festivals through their economic impact on culture (Madden 2001, Snowball 2005, Négrier & Vidal 2009, Klaic 2009). Another recent field of inquiry is the rise of mega-events as a new distinctive strategy of metropolitan areas (Gold & Gold 2005; Quinn 2005; Van Aalst & Van Melik 2012), which has also raised a certain amount of criticism (Chaney 2002; Rojek 2013). In the context of our current economic crisis, set off in 2008, festivals present a unique set of structural characteristics, displaying an adaptive ability to find innovative solutions but also showing a certain amount of vulnerability to cuts in the cultural budget (Veaute & Cottrer 2009; Lick, Long & Grige 2012).

Apart from their direct economic impacts, festivals can also be analyzed in terms of their impacts on the artistic milieu and through the lens of cultural democratization objectives (Salvemini, Morganti & Nuccio 2009; Morganti & Nuccio 2009; Delanti, Giorgi & Sassatelli 2011). The contribution of festivals towards the development and growth of public culture has attracted the interest of many researchers, including Jean-Louis Fabiani (2011) and Paolo Magaudda and Marco Solaroli (2011). The very growth of festival activity – both in terms of the number of festivals and the importance they represent for different branches of the arts – has contributed to a diversification of these participative social experiences (Dowd, Liddle & Nelson 2004; Négrier, Djakouane & Jourda 2010). In this work, we hypothesize that in order to understand how festivals react to these different economic and cultural issues, we must place them within many different analytical frameworks, and particularly within economic, esthetic, and governmental contexts. We will see how our variables (budget size, musical genre, the public recognition of a festival) influence how these issues are defined and addressed.

The social sciences literature in Europe on the subject of festivals is varied. We note that research in the fields of economy, management (Yeoman, Robertson, Ali-Knight, Drummond, Mc-Mahon-Beattie 2004; Bonet & Schargorodsky 2012), tourism (Picard & Robinson 2006), and marketing constitutes half of all published work. One quarter of the academic work is in political science, sociology, and ethnology, with the remaining quarter within history or the arts. The other defining characteristic of this scientific literature

is the relative importance of theatre studies, especially when compared to music or other disciplines.

Our research thus represents an original approach within a field that has until now been dominated by economics (especially with regard to the economic impact of festivals), by theatre, and by micro-studies of individual events or studies conducted on the national level. This last point calls for a new view from the perspective of a comparative analysis.

From iconic exceptions to politically recognized events

The second hypothesis involves situating festivals within a cultural policy framework that is also evolving in fundamental ways. The growth of research parallel to the festival field brings us back to the idea that festivals can be viewed as icons (Smith 2012) on the fringes of cultural policies. In this view, festivals would be exceptional phenomena within "the cultural exception" because of their character, supposedly temporary, festive, and commercial, as opposed to the permanent, serious, and Keynesian character of the legitimate cultural domain (Négrier & Jourda 2007). Over the past few years, we have seen real festival policies being set into place on the basis of artistic, cultural, and socio-economic criteria. Until now, these policies have not benefitted from a comparative analysis, and our current work attempts to generate this within the parameters we have set.

This comparative approach does, however, present certain complexities. Indeed, there are three broad trends in recent research on cultural policies: hybridization, territorialization, and differentiation. These trends directly influence our understanding of the relationship between festivals and cultural policy.

Hybridization means that the oppositions between cultural policy models tend to give way to new shared characteristics that are arise from imitation, from the mutual influence that takes place during cooperative ventures, or quite simply from a hostility toward older categories that are excessively institutional. For example this is the case with the typology developed by Chartrand and McCaughey who in 1989 defined four different cultural policy models on the basis of four different types of states (facilitator, patron, architect, engineer), these in turn corresponding to North America, England, France or Spain, and the Soviet block. Though this schema based on a classical institutional analysis and an examination of financial resources may have weathered a fair amount of criticism (Gray 1996, Zimmer & Toepler 1999, Belfiore 2004), it continues to be frequently cited. The reason for this is simple: a more recent approach based on the hybridization of models is not necessarily powerful enough to do away with the historical factors tied to state models. If we continue to look at national institutions, it is possible to continue finding certain unique

features in the Anglo-Saxon model when compared with the French, Spanish, German, or Scandinavian models. This does not prevent those who subscribe to a statist approach from operating within an international network and from seeking new ideas from abroad. This imitation of models and these policy transfers now take place rather frequently, much like the strategy of establishing benchmarks. In addition to the creation of culture ministries, we can cite the fixed book price agreement of the 1980s, the use of lottery revenues for the financing of culture, traditional state support, or new sources of patronage on a micro-level destined for events or for other productions. We can also cite current research on creative cities and on the changes of government levels engaged in cultural policy (Négrier, Préau & Teillet 2008; Saez & Saez 2012). Of course, all these new perspectives call into question the absolute specificity of these national *models*, but they are also integrated into these national contexts and are thus influenced, transposed, and partly absorbed by them. As we shall see in the present study, this is why we cannot entirely remove national models from our analysis as if they were obsolete. The reality of the situation is much more complex, and it will be interesting to see how our interpretation of the persistence of the differences between national models changes as we study cultural policy from the vantage point of one of its instruments, festivals.

Differentiation and *standardization* are two aspects of the same strategic dilemma. To understand this, it is necessary to go beyond a schematic and linear view (before/after, traditional/modern) of how cultural policies evolve. Elsewhere, we have developed the idea that, in this domain as in others which have nothing to do with culture, policies are subject to standardization and differentiation (Bonet & Négrier 2011b). These two trends are not mutually exclusive. On the contrary, they take place simultaneously. One finds this sometimes at the level of the state, but also at regional or local levels. Nor is this a brand-new phenomenon. For example, since the 1990s, researchers have been investigating how culture can be used for urban rehabilitation (Bianchini & Parkinson 1993). The link between culture and revitalization has been extremely successful, as we know. The inquiry was set at a metropolitan level, not limited to purely national developments, since differences in policy are not always due to national differences. This observation is doubtlessly also valid today. To put it simply, there has long been more in common between the cultural and festival policies of urban areas with 2 million people in Sweden, France, and Spain than there are between a metropolitan area, a medium-sized city of 200,000 people, and a small rural capital in France. The pertinence of an approach based on international comparison is not only due to the areas of convergence we have identified. There is also a trend toward differentiation or even competition between these metropolitan centers, each

with their own unique histories, contexts, constraints, and strategic goals. Paradoxically, this cannot be dissociated from a certain degree of standardization. Uniqueness no longer exempts policy-makers from comparison, nor does it protect them from the very competition it raises. Rather, it is a case of being distinct and attempting to take advantage of assets within a market that is at times symbolic, at times real. The same dialectic between differentiation and standardization exists within the festival sector as well. Throughout, standardization has been encouraged by the development of new digital technologies. For a while, these were considered as essential to strong and well-established cultural industries while it simultaneously fragmented consumer communities into smaller and smaller groups. However, we can now see that this interpretation did not take into account all aspects of this development. On the one hand, the digital economy can contribute to the creation of more heterogeneous markets of variable size, even if it also destabilizes the festival sector through concentrating more power in the hands of global web operators. On the other hand, these new technologies tend to breathe new life into the "social experience of music" (Yúdice 2011, p. 42) rather than threatening it. Finally, digital music tends to heighten rather than detract from the appeal of live shows, particularly in the case of festivals (Négrier, Djakouane, Jourda 2010). It was estimated at the end of 2011 that global record sales generated around 35 billion dollars annually, representing a slight decrease, while revenues from live performances increased to around 24 billion dollars.[1] Here, this phenomenon is not exclusively due to festivals. Indeed, we can see a complementary relationship between the digital consumption of music, particularly in terms of streaming media, and live performance.

The last point of comparison between festival policies and, more generally, between cultural policies is the issue of *territorialization*. In all the Western countries involved in our study, we have seen that government intervention in the cultural sector is being territorialized in ways that are technically different but similar in spirit. The differences are due to several factors. First, the territories do not have the same characteristics. For instance, the devolution of parliamentary and regulatory powers to the autonomous communities in Spain (Bonet & Négrier 2010) is not found in many other countries, particularly France or Scandinavia (Larsson 2003). Despite some fundamental differences, we can find similarities to this in the federalized Swiss system, in Belgium (Guérin 2009), and in Quebec (Saint-Pierre 2011). In our analysis, we will see the varying affect territories have on festivals, their economy, and their artistic or cultural influence.

1. Source: INA Global.fr; http://www.inaglobal.fr/musique/article/lannee-de-la-reprise-pour-le-marche-de-la-musique, retrieved on 6/18/2013.

Further, our comparative approach must also take into account the specific historical and political characteristics of each regime, as we stated above. Beyond the territorial level, there are different conceptions of how power should be exercised: there is the policy of direct government intervention in Latin Europe as opposed to several different approaches based on the remote management of cultural policies.

Yet, the spirit of the law and the importance of territories cannot explain everything. In our case, the vitality of the festival sector follows its own patterns and must integrate or transform the different traditions within each of the countries in our study in order to take part in the international festival landscape. One of our research hypotheses is that, within this diverse set of territorial characteristics, governmental philosophies, and festival traditions, we can identify common trends or significant areas of convergence in the empirical data, as well as certain contrasts which we did not anticipate. To put it plainly, we hypothesize that the category of "festival" can be seen as both as an object in itself and as a tool of comparison, also allowing for new scientific discoveries.

Comparing instruments

This third point addresses issues of comparative analysis in the context of globalization, particularly within a field where international exchanges are becoming more and more commonplace. This is true for questions of audience appeal – even if audience sizes are often small (Négrier, Djakouane, Collin 2012; Pasanen & Hakola 2012) – and for international programming choices. We have identified this issue as being particularly rich. It brings together the current state of research on festivals, a comparative analysis of public policy, and a rather promising method of comparison using specific instruments (Lascoumes & Le Galès 2004) rather than on the basis of large public policy programs.

These considerations raise several questions, the first of which is to determine whether it is indeed possible to compare festivals. As we have already observed, until recently this idea was not accepted by those who continued to see each festival as something irreducibly singular. There is much to learn from a comparative analysis on the scale of festivals themselves, but it is also important to see them not just as instruments for reaching a variety of objectives – as aspect which will be studied over the course of this work. Rather, the festival field also allows us to observe the cultural policies pursued by different levels of government, and in addition the public/private partnerships often associated with these events. Our hypothesis is that the festival-instrument can reveal a great deal about cultural policies both in terms of their diversity and their points of convergence. If institutional policies are still largely influenced by a state-based approach, festivals are situated at another level, one that can be very

local or, for some events, international in nature. We thus predict that an instrument-based approach has much to teach us in terms of comparative analysis.

In this project, we have not wanted merely to compare and contrast the competences of different countries in the context of an academic debate or a work. Rather, we have desired to go a step further by adopting a unique method which remains valid for each of the countries involved in our research. In the end, early work on festivals has provided us with insight into one of the main issues we are confronted with: the festival field continues to resist scientific analysis because of diversity in terms of individual events, national traditions, and its complex place within the performing arts economy. We have subjected this to two different methods of comparative analysis. The first treats festivals as a means of applying an analysis which is strictly identical. In the second method, we hold to the principle that a comparative analysis does not consist in simply applying an analytical framework to a field. A comparative analysis conducted within a collective project also involves a comparison of its subjective elements in terms of the specific scientific and territorial contexts which influence the participating researchers. This method is central to the second part of our work.

Three possible methods

In a domain so heavily characterized by its diversity, we know how difficult it is to collect homogeneous data that is sufficiently reliable to permit comparison without risking serious misinterpretation (Klamer, Petrova, Mignosa 2006). Indeed, we have already had to face this difficulty, even during the present study. To meet this challenge, we made three sets of choices before undertaking our research.

Defining a festival

The first involved arriving at a definition of the festival. This might seem to be fairly easy to do, but it can raise long, hairsplitting debates. It is not difficult to establish a broad definition of a festival: an event limited in time and space which develops a specific artistic project and takes place at regular intervals. These criteria represent an almost universal consensus of the notion of the festival. However, two areas in particular have created difficulties. First, the growth in the number of festivals accompanies a great deal of transformation within the event industry. In this context, each of the terms within the above definition is now debatable. As we shall see in our analysis, the temporal limit of festivals has become relative when we consider that festivals offer activities outside of their season dates. The spatial limit also tends to lose some of its meaning when we observe the development of strategies of decentralization of spectacles, and while

certain festivals may take place on several sites, travel from site to site, or even be duplicated in other regions or countries. Likewise, the concept of the artistic project is also being modified by contemporary practices. The artistic niche in which a festival is born can later become merely one reference point among many present within the event as festivals try to renew themselves by bringing together different esthetic registers within hybrid programs. Thus, there is an artistic project, but it is not always tied to a specific style. As for the periodicity of a festival, besides the death rate affecting certain sectors or countries during a period of recession, we note that it can vary from one to two years. These are the primary critiques which can be made against the classic definition of a festival. These objections can be met by taking the view that these criteria must be applied with enough flexibility to take into account each festival and that there can be a restrictive or extensive interpretation. We must then develop indicators which allow us to retain certain events as participants within this sector. Though we have had to impose some arbitrary limits, this has indeed been our approach, and the goal has been to constitute a sample representing as diverse a set of festival formats as possible. For the purposes of this study, we have thus chosen to retain those events which, in addition to satisfying the above criteria, have organized at least two seasons by 2011 – suggesting a certain degree of periodicity. Moreover, they must have scheduled at least five concerts over the course of a minimum of two days, implying a certain amount of deliberation over artistic programming choices.

Only music, but all forms of music

The second choice involved limiting the study to the field of music. In comparative analyses, too many differences can weaken the validity of the conclusions since it becomes no longer possible to identify which factors explain the empirical results. The first decision, then, was to not open the Pandora's box of dance, theatre, or street performance in order to avoid a sample of unmanageable breadth. This decision can be positively justified in two ways. Music is far and away the most important festival activity in Europe. Consequently, this sector is the most representative of the broader festivalization of culture. Music is also particularly interesting in terms of its diversity, which can be analyzed and classified. Classical music, world music, jazz, and rock correspond to different social spheres and intersect with public policy in different ways. It was thus important to consider whether there were several different but overlapping "festival worlds". The choice, then, for this research is 'only music, but all possible forms of music'. Each of the national samples has thus been constructed as a function of this principle of internal diversity, a point we shall return to later.

390 festivals: a large panorama

The third choice was to not seek out a representative sample within each country. It is one thing to seek out a certain degree of diversity in terms of our esthetic, economic, and political data for each country, but it is another to claim that the sample is representative of festival phenomena within a country. We have chosen to not pursue this objective, partly because for some it was unobtainable. The different banks of cultural information do not always provide the basic data for this sector, particularly with regard to festivals. For example, much to the surprise of many researchers, it is difficult to determine the exact number of festivals in France. If the baseline population remains unknown, how can one claim to have constituted a representative sample? On the other hand, this objective, which would have required a great deal of work in vain, was balanced with a desire to cultivate strong relationships between festivals and research teams. This study required a certain amount of festival involvement and collaboration with the researchers, and we preferred to privilege this relationship over mathematical rigor when creating our sample. Between receiving the first questionnaire results and finalizing the database, we were indeed able to benefit from the different exchanges we had with the festival teams, convincing us of the importance of this choice. Consequently, our comparative analysis is based on a large number of events (390 – see the list in Annex 1) displaying a wide degree of musical diversity and situated in ten national groups. It constitutes the Festudy database to which we'll often refer in this book. These groups involve two distinct categories, the first of which is the most important. These are the countries in which there is a national team of festival researchers and a diversity of events: Belgium, Finland, France, Ireland, Norway, Quebec, Spain, Sweden, and Switzerland. Belgium represented a particular case, with a clear distinction between Flanders and Wallonia which we observed *a posteriori* in our data. The Flemish Community and the Wallonia-Brussels Federation have the greatest amount of authority in cultural matters but exercise it in very different ways. Hereafter, we will sometimes refer to these two communities as "Flanders" and "Wallonia", while in the figures they will be represented by "Flanders" and "WBF". This enlarges our group to a total of ten "countries".

The second category concerns isolated festivals in six other countries that wanted to participate in the project. These festivals in Bulgaria, Denmark, Iceland, Lithuania, Luxembourg, Poland, and Portugal became involved in our research through their participation in different European networks (the *European Festivals Association* or *De Concert*). In many ways, these festivals have contributed to our understanding and have lent credence to our results.

This presents us with a highly interesting international panorama of festivals. We can identify countries whose cultural policies are based on direct government administration (Belgium, France, Spain, Switzerland), countries that follow the Anglo-Saxon "arm's length" approach (Ireland and the United Kingdom, as revealed in a monograph in the second part of our work), and three Scandinavian countries (Finland, Norway, Sweden). We also benefit from Quebec's involvement in our project, making comparisons possible with North America, even though this province displays unique characteristics with respect to Canada and North America as a whole. Nevertheless, in this study we will see that it is interesting on the one hand to consider that Europe is not a completely heterogeneous group (this would be the function of a "control group") and on the other to reach conclusions that go beyond geopolitical oppositions (a festival "invariant"). We regret that we were only able to include one Central European country. The participation of one Polish and one Bulgarian festival is not sufficient to represent the richness that this would have provided us. We had initially cooperated with Peter Inkei of the Budapest Observatory. Unfortunately, the current situation of the cultural sector and cultural studies in Hungary rendered their participation impossible. However, in the second part of this study, we were able to include an analysis of Hungarian festival policies conducted by János Szabó.

Despite this international diversity within our sample, we would like to remind readers that our research does not place the variable of festival nationality in a position of predominance, as can sometimes be found in comparative analyses of public policy. Indeed, we have confirmed our hypothesis that comparisons between festivals often require us to go beyond questions of nationality, though without doubt, nationality continues to influence how festivals interact with public policy in specific ways, as we shall see. However, the national variable becomes secondary when we turn to other categories of data, such as artistic programming, communication strategies, marketing, or human resources management. In what ways, then, is festival nationality still pertinent? This is one of the intriguing issues of this research.

Finally, our study is divided into two distinct parts. The first part presents the results of our field research on 390 festivals, based on questionnaire responses and interviews. The second part contains monographs which detail for each country the historical origin of festivals, how they intersect with public authorities, their current structures, and the challenges they currently face. We note that our discussion of the weight of the national variable is not based on avoiding its importance but on scientific observation, both in our quantitative analysis and in the monographs. Of course,

these two parts do relate to each other. In order to analyze our quantitative data, it was necessary for us to have a qualitative and comparative appreciation of the festivals and national groups in our sample. Likewise, to understand the festival landscape on a national level, we relied heavily on the results of our field research.

Festival du Périgord Noir



Part I

Festivals: Resources, Dynamics and Strategies

In the first part of our study, we will analyze the results of our survey, conducted over the course of 2012 and using a sample of 390 festivals as its base. Before presenting the themes of the study, it is necessary to fully develop the elements that comprise our sample. As we explained in the general introduction, this sample was constructed in accordance with three major principles.

The first of our principles was to maximize the amount of diversity in terms of musical genre within our sample. In each participating country, we studied festivals of different musical genres, whether classical music or jazz, traditional or world music, or rock and pop music.

The second guiding principle concerns budgetary diversity. We know that the majority of festivals are unlike the most spectacular events, such as big classical music events or the huge concerts sometimes found in rock or world music. It is thus important that budgetary diversity be sufficiently represented in our sample. As a result, we have studied festivals that can draw more than 100,000 audience members as well as those with audiences of less than 5,000 people.

The third principle is tied to the political economy of festivals. The relationship between festivals and public financial support varies widely, with some festivals being strongly supported by national or local cultural policies while others receive very little public funding. The samples for each country in our study display a remarkable degree of diversity in financing, regardless of the sample size.

The questionnaire – an English version of which was translated by each national team into their own language (www.festudy.com) – consists of four parts corresponding to the four axes defining a festival.

Figure 1. The *Festudy* sample

Countries	Festivals
Finland	20
Flanders	18
France	92
Ireland	21
Norway	10
Quebec	43
Spain	97
Switzerland	7
Sweden	23
WBF (Wallonia-Brussels Federation)	52
Others (Bulgaria, Denmark, Iceland, Lithuania, Luxemburg, Poland, Portugal)	7
Total	**390**

The first section contains the elements necessary for establishing the "identity card" of a festival: status, locality, season dates, age, and audience. This part is also concerned with a festival's strategic, artistic, and cultural practices. The goal here was to identify how a festival's events spread within their territory as well as to determine which activities were conducted outside the festival's season (conferences, educational events, master classes, etc.) and the partnerships festivals have created both among themselves and with other local social and cultural institutions.

In this same section, we were also interested in how the festival's program was developed. We classified the musical styles of the festivals and of other artistic events when they are present within a festival. After a period of reflection, we were able to distinguish five broad musical genres.

Figure 2. The Festudy music genres

Music genre	Festivals	%
Classical	141	36%
Jazz-Blues	53	14%
Multi-style	20	5%
Rock-Pop	104	27%
World-Trad	72	18%
Total	**390**	**100%**

The grouping *Classical* is comprised of all musical repertoires falling within the fields of classical or art music. For this, we found 141 matching results. The second group identifies 53 jazz and blues festivals, while the third

concerns 104 rock and pop festivals. The fourth contains 72 traditional and world music festivals. Finally, there were a number of festivals for which we were unable to identify a dominant genre as their programs brought together classical music, world music, jazz, and/or rock. For this reason, we have created the group *Multi-style*, comprised of only 20 festivals but which, as we hypothesize, present unique and remarkable attributes. We will see whether this is the case in the following chapters. More generally, we will discover the interpretive richness of the data provided by this system of classification.

We were also interested in the main sources of inspiration that a festival's artistic director might draw upon when developing the festival's programs. This, as we know, is at the heart of a festival's identity but is also its black box. In addition to these sources, which we have discovered to be several in nature, we have sought to interpret the objectives set forth by a festival. Here, too, we will see that they correspond to a diverse set of categories, testifying to the variety of goals which festivals pursue: showcasing original artistic projects, promoting a musical style, providing entertainment and leisure opportunities, contributing to regional development, etc.

Finally, we sought to measure change over the previous four years in order to determine how festivals have evolved. These changes are of different orders: the level and quality of public funding, the question of private funding, the evolution of programming choices, the creation of partnerships, and strategies for attracting new or different audience members, among others.

Globally, the first part of our questionnaire enriched our understanding of the variables defining a festival's identity and the artistic and cultural choices which each festival must make.

The second section, dedicated to public-relations strategies, is more specialized. We are frequently confronted by the image that festivals invest heavily in all forms of communication on the national and international scale. However, our goal was to study empirically how festivals function in reality. Here we looked at how festivals use the press, their international prestige, and new media technologies ranging from the Internet to smartphone applications.

The third section is concerned with human resources. In the conventional view, we are presented with small festival teams, temporary staff members and often a group of volunteer workers. If we accept this view, festivals would not be an important part of the cultural and artistic job market. This is thus the image we wanted to verify when we were studying human resources, an analysis based on five main axes. The first axis involves employment practices in general: working hours, employee status, and the nature of festival work. It measures the extent to which festival positions are permanent as well as what sort of work is being performed. The second axis involves the gender ratio within the main branches of festival work: artistic directors, technical

staff, administrative teams, and the public relations department. The third focuses our attention on the profile of festival directors: their age, the number of directors, and the scope of their responsibilities. The fourth is concerned with determining the skills necessary for holding senior positions in the fields mentioned above. The goal was to measure to what extent employees possess the necessary skills for managing a festival. Finally, we surveyed festivals to discover how they have evolved in the recent past in terms of gender ratios, the national origins of personnel, the relative growth of staff sizes, and the presence of volunteer workers within festival teams.

The fourth section of the questionnaire addresses the issue of finances. We collected data from festivals concerning the cost structure and volume of their expenditures (whether artistic, technical, administrative, or related to communications) and their revenues (originating in festival-generated income, subsidies, patronage, or other sources). We have also taken into account how budgets have evolved since 2008, our goal being to measure the impact the economic crisis has had on festivals.

We have also taken into consideration the ticket prices which festivals have set. Included here are their policies regarding free concerts, discounts for certain classes of audience members, season passes, and other possibilities. We will see that our study of festival finances provides a comparative database that yields interesting results with regard to the variables of musical genre and national origin.

With our quantitative analysis, the reader will notice that we employ two different numerical tools. This necessitates a brief explanation.

The first tool involves the comparison of the average and the median. The average is calculated by dividing the total numerical value of a sum by the number of its constituent parts. For example, the average festival budget is obtained by adding together the budgets of individual festivals and dividing this sum by the total number of festivals. In our study, this yields an average budget of 860,000€. If all the festivals studied had approximately the same budget, the average would in itself be sufficient. However, the reality of the budgetary situation is quite different: many budgets are much smaller than this average while a few large festivals have budgets that are greatly in excess of this figure, some reaching the spectacular figure of 15 million euros. The average here expressed provides us with a figure which is very artificial for our purposes. This explains why we must also calculate the median. When dividing our sample into two equal parts, the median expresses the line of demarcation between them. Thus, in a sample comprised of 390 festivals, the median is to be found in the 195th place. This figure is impervious to the presence of both extremely large and small numbers. Thus, it expresses a more ordinary "reality" which characterizes the experience of the greatest number of

festivals. Going back to our example of budget sizes, the median budget of a festival is 273,000€, or three times less than the average! The deviation between the average and the median gives us an idea of the diversity of our sample. This is why we have often chosen to present these two figures side by side.

Likewise, we have often chosen to present percentages both because of the diversity within our sample and because of the important information they furnish. Consider the example of the percentage of revenue coming from public funds. Here, we could present the average of the total (or the average percentage). For the sample taken as a whole, this figure is approximately 32%. This is the sum of all of the subsidies for all festivals compared with the sum of all revenues for all festivals. However, the largest festivals present us with a paradox: with their extremely large budgets, the percentage of revenues from subsidies is, with a few exceptions, smaller than it is for other festivals. Consequently, the figure of 32% has been artificially deflated and does not really represent the reliance on public funds that characterizes the budgets of the majority of festivals. We can also average all the percentages, a figure obtained by calculating the percentage of public funding with respect to total revenues for each festival and then determining the average of all the percentages. When we do so, we obtain an average of 45% for public funding, a figure which more aptly describes the budgetary situation for the majority of festivals.

These particular choices in statistical presentation have warranted an explanation. However, we have also felt the need to use other modes of presentation when confronted with certain figures or in order to answer specific questions, including group sizes, the arithmetic mean, and global percentages, for example. This choice in presentation has been made depending on how effective a number is in clarifying a particular aspect of the festival landscape.

We will now study the results we have obtained from our questionnaire. We will begin with a presentation of the most important variables of our study, those that can have a decisive influence on the information we have collected. These variables include the following: musical genre, budget size, the age of the festival, the legal status, the audience size, or the duration of the festival as well as the time of year at which it takes place. These are the variables which we will be using throughout the following chapters to help with interpreting our results.

We will then address festival financing in detail. Here, we will discover the impact of these variables, especially those of festival nationality and musical genre.

The next three chapters will be dedicated to an analysis of the cultural projects and policies of festival programming. Thus, we will be looking closely at

festival activity both during and outside the festival season, at audience composition and size, and at ticketing policies. In the fifth chapter, we will study the issue of cooperation. By this we not only mean cooperation between festivals, often considered to be very individualistic and thus not disposed to collaborative ventures, but also the cooperative relationships that festivals forge with other bodies within their local environment. In the final chapters of this part, we will look at both the public relations and human resource strategies employed by festivals. In these chapters, we will again be identifying the variables which will allow us to differentiate between festivals and to isolate the characteristics which, hypothetically, all festivals could have in common.

After having addressed all of these themes, we will present a series of convergent and divergent trends in our data. Some of these are associated with national, generational, or esthetic variables. In order to show more clearly these broad groupings which will illustrate the non-random diversity shown in our study, we have opted in favor of an analysis of festival clusters. By this we mean festivals that can be grouped together while simultaneously analyzing several types of variables. This technique gives us both a holistic and realistic vision of the festival world. We will explain this method in more detail later in this work.

The first part of this work is an essential stepping stone in our collection and analysis of festival data. Indeed, we have now been able to generate a sizeable database which will permit further specific analyses in the future beyond what we have been able to furnish here. We hope this database will be continually updated so that this present work will represent the first in a series of studies of how festivals function over time, how they interact with European artistic milieus, and the role they play within cultural public policies.

Chapter 1.
Festivals in seven variables

In order to analyze the sample of music festivals on which our study is based, we have selected seven broad characteristics or key variables. These emerged as crucial elements while we were studying the data we had gathered and will be described in detail over the course of the following chapters. The interaction of these variables with our survey questions will allow us to explain with greater precision the different types of festivals while providing a better characterization of the sample as a whole. Of course, some questions will require other factors to explain certain aspects of the festival landscape. We will explain these in the following chapters. The seven key variables we have alluded to, however, will bring us the most information and make up the rich universe of data we will be exploring.

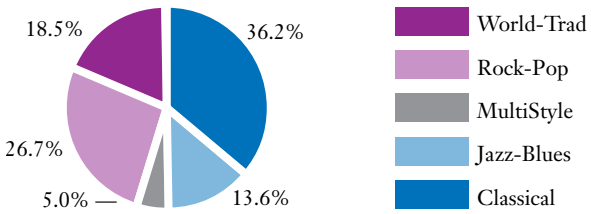
The key variables we have selected are the following:
— the country (nation);
— the dominant musical genre;
— the age of the festival (the number of seasons a festival has had since it was established);
— the number of audience members;
— the size of the budget;
— the number of days in its program;
— the season of the year.

We will now examine each of these variables as well as the results produced by their interactions. We will not go into depth in our explanations of the results. Instead, we shall seek to present how the variables operate among themselves, to confirm a few intuitions we have had, and also to look more closely at some of the received ideas often heard about festivals. An in-depth study will be conducted in later chapters. We have already commented upon the size of the sample by country as well as the methodological limits for each of the national samples in our introduction; we will therefore not explore territorial characteristics here. We must of course be careful with respect to this variable, but it does go a fair distance in explaining characteristics like the legal structure of festivals, their resources and particularly their funding models, as well as the cultural and political aspects which, among other factors, provide a framework for a festival's existence.

The second key variable, and the one which probably provides the best description of a festival, is the dominant musical genre. It was necessary to group festivals into a limited number of artistic styles. We have thus defined four broad musical trends or traditions, accompanied by a fifth group of festivals which are difficult to classify because of the diversity of styles present within each event and the lack of a single dominant genre. Clearly, each festival can be characterized by a large

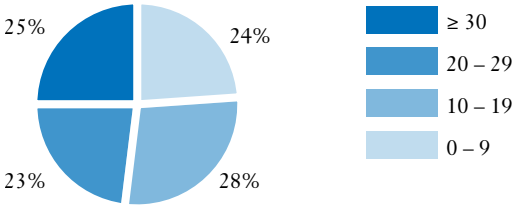
array of musical activities, sometimes times deliberately eclectic while at other times very specialized, as we will see in the description of primary and secondary styles (cf. chapter 3 on cultural projects). Despite this diversity, each festival can be classified into one of the five groups we have established. Thus, classical or art music represents 36.2% of the total number of festivals analyzed. It is followed by rock and pop music, representing 26.7%, then world and traditional music – a very diverse group including folk, traditional music, and all the variety of world music – with 18.5%, and finally the group of jazz and blues, with their many acoustic modes of expression, constituting 13.6% of the total. The smallest group is multi-style, which brings together festivals open to other artistic genres but centered on a single instrument (guitar, piano, hamonica or voice, for example) with those that opt for a large program in which none of the above genres dominate.

Figure 3. Festivals by dominant musical style (%)



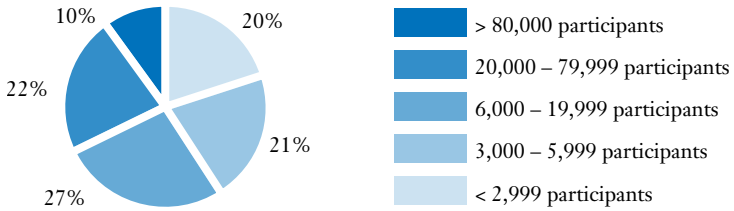
The second important factor is a festival's age since it indicates the wealth of experience a festival has been able to accumulate as well as the degree to which a festival has consolidated its activities. The average age of the festivals studied is 21.5 years, with a median slightly below 18. In 2011 (the temporal reference point of our study), 24% of the festivals had fewer than 10 seasons, and 28% between 10 and 20 seasons. Thus, the festival landscape at the crossroads of the 20th and 21st centuries is characterized by a relatively young average age. On the other extreme, 25% of the festivals are more than 30 years old. This group is fairly heterogeneous, including very old festivals, some exceeding 75 years, like the *Festival des Harmonies et Orchestres Symphoniques* or the *Saison Musicale de Royaumont*. Nevertheless, these two festivals are far behind the most venerable festival of the world, *The Three Choirs*, with almost three centuries of experience.

Figure 4. Average number of seasons for festivals up to 2011 (%)



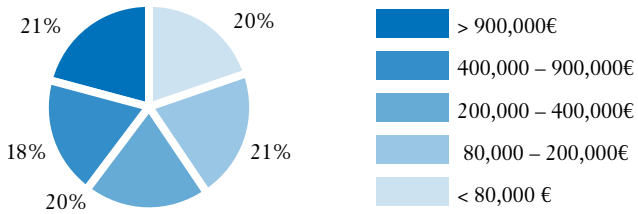
Nevertheless, we can observe that a festival's impact is not as closely associated with age as it is with other quantitative indicators such as budget size or the number of audience members it records. The average number of festival-goers is situated at 28,455, but the median is much lower: 7,888 audience members. This means that 50% of the festivals studied do not attract more than 8,000 audience members. More specifically, 20% of them attract fewer than 3,000, while 10% of the festivals with the largest audiences exceed 80,000. The most popular festival of the sample, with an audience in excess of a million festival-goers, is Quebec's *Festival d'Été*, an immense event spreading over large open spaces and requiring very complex logistical strategies and organization. Clearly, the success of these festivals cannot be measured exclusively in terms of their audience sizes. It is also necessary to take into account their artistic, social, cultural, and economic objectives, as we will see in the following chapters.

Figure 5. Average festival audience size (%)



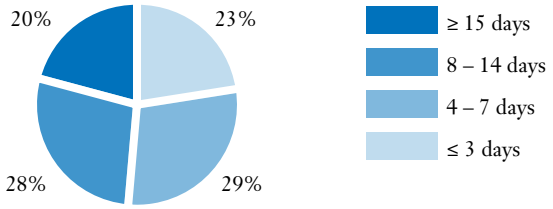
Another key variable for understanding the different management models used by festivals is budget size. The average budget for a festival is around 860,000€, but the median is situated at only 273,000€. Indeed, 10% of the most modest festivals have budgets below 45,000€ while 10% of the most powerful festivals have budgets in excess of 2.1 million euros. These figures illustrate the high degree of heterogeneity which characterizes the music festival universe, one which ranges from the complex and expensive macro-festivals, often part of metropolitan strategies, to the most modest events which are put in place with extremely limited resources.

Figure 6. Average budget sizes of festivals (%)



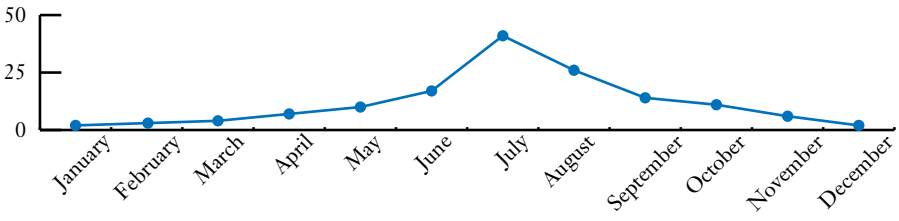
To make our analysis of festival management more precise, the number of days of the festival program becomes important. We must not confuse this figure with the number of days between the inauguration of the festival and its closing ceremony since many festivals concentrate their activities on the weekends. The average number of days of activity is 10, with a median of 7 days. Note that 23% of festivals have a maximum length of three days, while 10% exceed 23 days of programd activities. It is important to relate this information to the number of programmed concerts as well as the intensity and length of the event. Indeed, the level of daily activity can vary greatly and the number of days with no activity is also variable. While many rock/pop festivals concentrate an intense amount of activity on just a few days, many classical music festivals tend to hold few concerts per day and do not always schedule concerts during the week.

Figure 7. Number of days with activity (%)



Finally, the period of year, in itself characterizing a festival, is an interesting factor particularly since events are no longer limited to the summertime. Of course, the months of July (foremost), and then August, hold the greatest concentration of festivals, and the amount of activity between the months of December and March is considerably lower.

Figure 8. Monthly distribution of festival seasons (%)



* The total is greater than 100% because festivals can straddle two months and thus be counted twice. This gives a more precise image of the relative importance of the summer season.

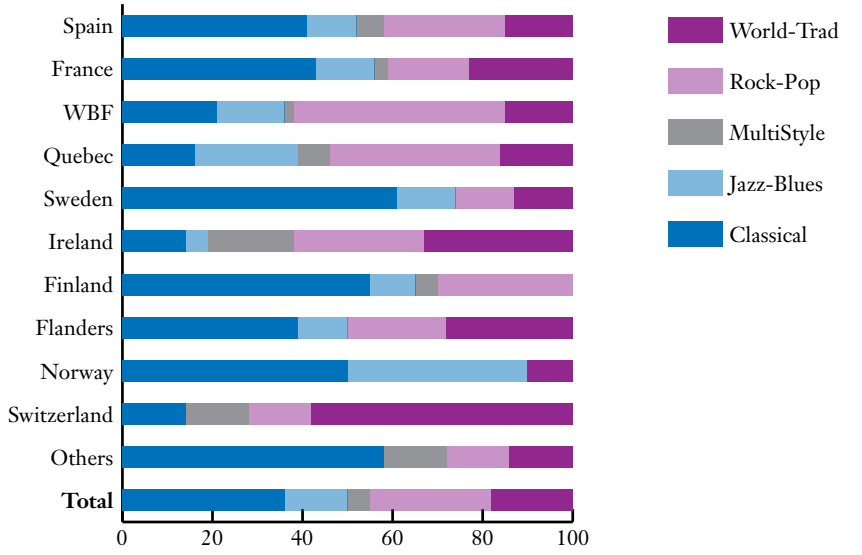
In order to classify our data in this regard, we have divided festivals into three groups: those where the activity takes place principally during the two

summer months, those which are just before or after the summer period, and those which take place during the rest of the year. In fact, 51% of the festivals are held in July or August, 21% in June or September, and the remaining 28% during what was once called the off-season: between October and May.

Interaction of variables

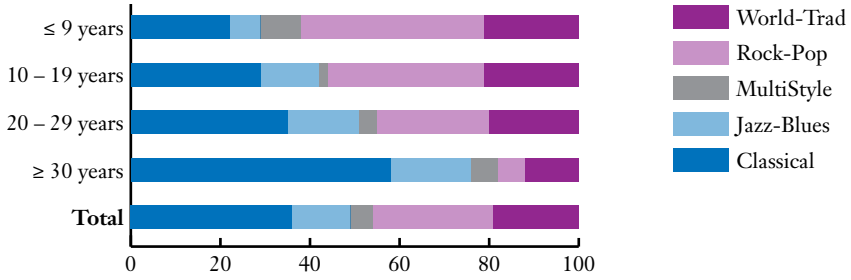
Once our key variables have been explained within their own context, we will examine their interaction in order to see the points of convergence and divergence between festivals. As we have already indicated, the 'national' variable should be carefully interpreted because of the small sample size and the esthetic orientation of some of the sample sub-groups. Classical music is thus over-represented in Sweden, rock in the Wallonia-Brussels Federation, world/traditional music in Switzerland, and jazz in Norway.

Figure 9. Dominant musical genre by country (%)



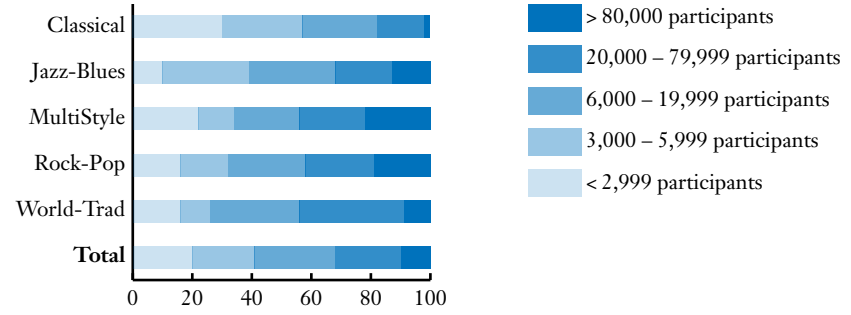
Musical style is closely related to the age of a festival, the number of audience members, budget size, and the number of days during which a festival is held. Thus, with respect to a festival's age, 58% of the festivals with more than 30 seasons under their belt are dedicated to classical music, while only 6% of the oldest concentrate on rock/pop. Inversely, many of the festivals created over the last ten years are dedicated to modern musical styles, while classical music here represents only 22%. We can also see a growing number of multi-style festivals over the last decade.

Figure 10. Dominant musical genre and festival age (%)



Looking now at the relationship between musical genre and audience, those with higher admissions are most often found within rock/pop, while classical music festivals tend to attract smaller audiences, consistent with the natural acoustics and sizes of the spaces they use. However, festival diversity makes it difficult for us to generalize. The relationship between musical style and audience does not prevent classical music festivals from having audience sizes in excess of 20,000 participants, while some rock/pop festivals have small audiences, a fact contradicting the standard image of large youth rallies they often evoke for us.

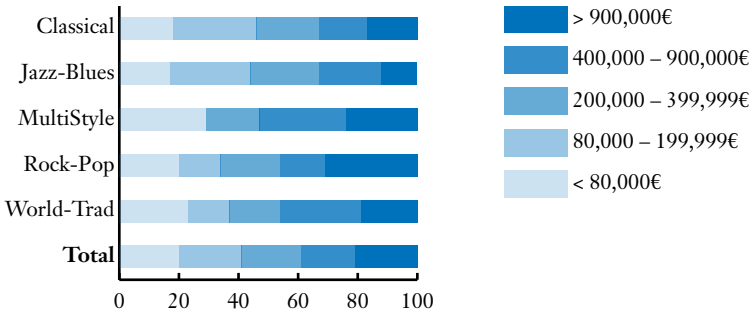
Figure 11. Dominant musical genre and audience size (%)



Likewise, the interaction of musical genre and budget also reveals a large variety of situations. Take the example of rock/pop festivals. Of course, they represent a significantly higher proportion of festivals with budgets in excess of 900,000 euros: 31%. However, the majority have a budget below 400,000€, and one rock/pop festival out of five has a budget of less than 80,000€. Throughout this work, we will have to take into account this structural distinction between a small number of festivals of considerable size and the majority of festivals, and this regardless of festival nationality or musical genre. Festivals are radically different depending on whether the budget is 80,000€, 500,000€, or 10,000,000€; and this is

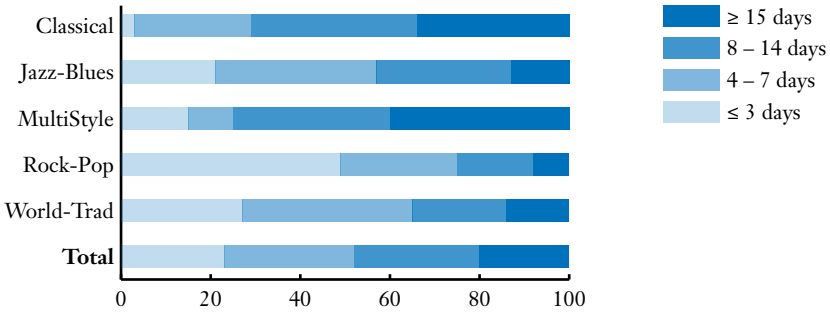
the case for the classical, jazz, and world music sectors, just as it is for rock music.

Figure 12. Dominant musical genre and size of budget (%)



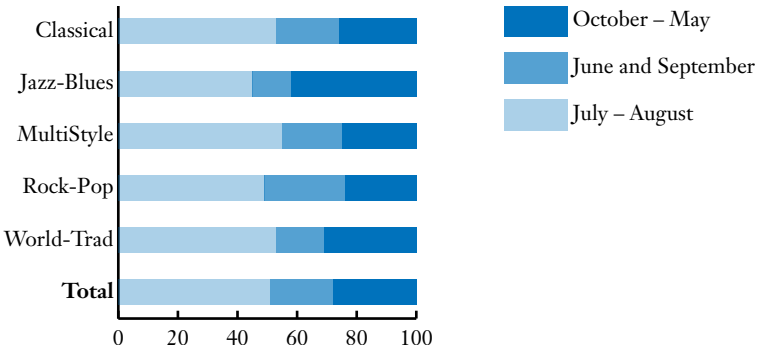
Now we will turn to one of the most varied aspects of festivals: the number of days of festival activities. Half of rock/pop festivals last a maximum of three days, 40% of multi-style festivals exceed two weeks, and 71% of classical music festivals have scheduled more than seven days of activity. Finally, jazz/blues and world/traditional are situated between these two extremes.

Figure 13. Dominant musical genre and number of days of activity (%)



There is no meaningful relationship between musical genre and the period of year for festivals. In most cases, summer is clearly the most dominant season for the majority of festivals. However, it is interesting to note that 42% of jazz/blues festivals are held between October and May, though the average number of festivals for this period is only 28%. Undoubtedly, this indicates a steady change for these genres and their audiences, but it also suggests a subtle form of competition among festivals for timing and spaces, an aspect we will study later.

Figure 14. Dominant musical genre and period of the year (%)



We will now analyze a festival's age to audience size, the expenses budget, and festival length. As we indicated earlier, the fact that the majority of the oldest festivals are dedicated to classical music and the newest festivals to rock/pop of course influences the results. This fact is particularly evident when we relate the number of days of activity to festival age. The newer festivals last an average of three days, while the time span is much longer for more established events.

Figure 15. Festival age and the number of days of activity (%)

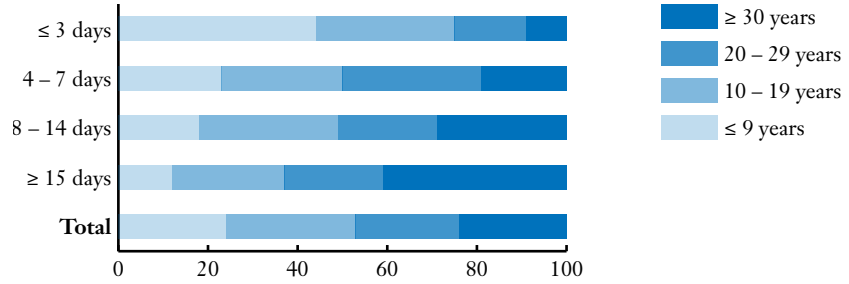
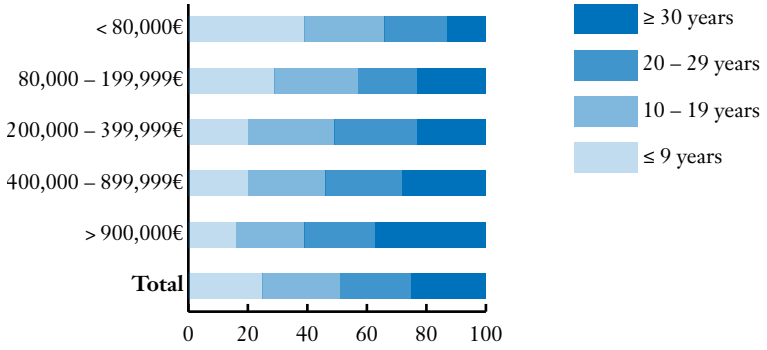


Figure 16. Festival age and budget size (%)



If we examine other key variables in terms of festival age, we see that the newest festivals attract smaller audiences and have smaller budgets, while the oldest tend to have high budgets, indicative of how firmly established they are within their sector and territory. However, in the intermediate age brackets, we can find a high degree of diversity for which age is not a determinant factor, both in terms of financial resources and audience size.

Finally, audience size is closely related to budget size. Attracting more audience members means higher budgets, and vice versa. Be that as it may, this rule cannot be applied automatically at all levels since some exceptions are to be found. Indeed, some festivals with relatively small budgets attract very large audiences while others with large budgets and high production costs – like festivals of lyrical music – cannot occupy large spaces without sacrificing the unamplified acoustics that characterize them. This is one of the cases where budget size is not directly proportional to audience size. On the other hand, a festival with an unamplified musical program and relying on a sizeable contingent of volunteers to bolster its workforce or its program can attract a sizeable crowd, sometimes through free ticketing, without necessarily having a proportionally sized budget.

These, then, are the principal relationships between our different but complementary variables, and they allow us to delineate large swathes of ground within the field of festivals we are studying. With this introductory "glossary," it is now possible for us to analyze in detail each dimension of the festival landscape while examining its particularities, contrasts, and evolutions.

Chapter 2.
Festival Finances

An analysis of how cultural events are funded shows that festivals occupy a special place for three reasons: their expenses, their income, and the economic context in which our study was conducted. Concerning expenses, the received idea would have us believe that festivals place great importance on publicity. Because of their short duration, festivals would thus feel the need to compress intensive publicity campaigns into a short time span. For this same reason, festivals would seem to have few payroll expenses corresponding to a more restricted permanent staff.

With regard to income, festivals are often considered to be more dependent on their own resources (ticket sales, merchandizing, etc.) than their more permanent counterparts in the field of cultural events. The nature of their activity is equally considered to attract more sponsorship and private donors than other artistic or cultural institutions. In short, festivals are often seen as the "private" side of cultural policies whereas permanent institutions would be their "public" counterpart.

Turning to the economic context, since 2008 Western economies have been subject to a recession whose impact varies from country to country but which nevertheless affects the ability of the government to continue funding some public events. In particular, the financing of cultural activities has been significantly reduced, though the time scale and the amount of these reductions depends on the country, as we will see in the second part of this study. However, almost everywhere, budget cuts affect cultural activities, and here, festivals perhaps have a special place as well. This can represent both an important asset but also a source of difficulty for festivals.

This can be seen as an asset because, as has been mentioned above, festivals are able to limit their dependence on public funds while attracting private financing. Yet it is not a given that private financing is enough to balance a festival's budget, since both sponsorship and public attendance being affected by the economic crisis. The difficulties for festivals arises from the fact that governments, being subject to budgetary slashes, can less easily choose to finance temporary events such as festivals as opposed to more tangible and long-term investments such as theatres or auditoriums which leave a permanent mark on the landscape. Are festivals as big a target for budget cuts as we are led to believe? This is what we will see at the end of this chapter. However, before we can address this question, it is important to verify the first two hypotheses we have posited, namely those concerning the structure both of festival expenses and of their income sources.

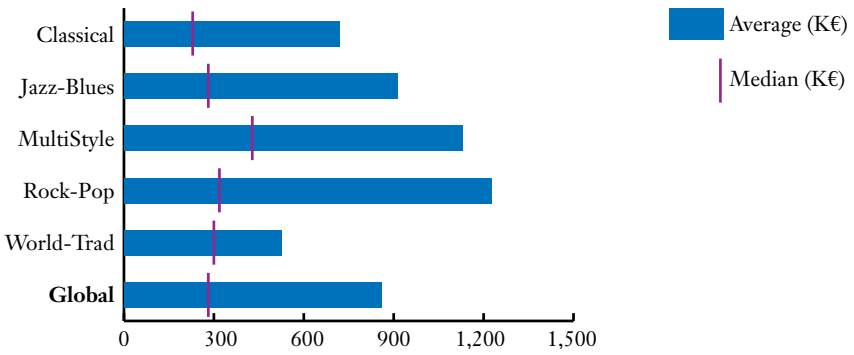
In this chapter, our thesis is that the world of festivals is not homogenous enough to validate or refute our hypotheses globally. It is necessary to study in detail how musical styles, national contexts, and the history or relative

importance of a festival come into play in order to have a more precise understanding of the different currents affecting their finances. It is only in this way that we can precisely measure the uniqueness of festivals and place them in relation to other variables.

Generalized budgetary diversity

Festival expenses, as we can see in the figure below, provide a good illustration of their budgetary diversity. This diversity can be encapsulated in one figure: regardless of musical genre, the median of the total budget is inferior to the average. This indicates that, for all musical styles, big events tend to artificially inflate the average expenses. The median, on the other hand, expresses a numerical reality more closely approximating the experience of the majority of festivals.

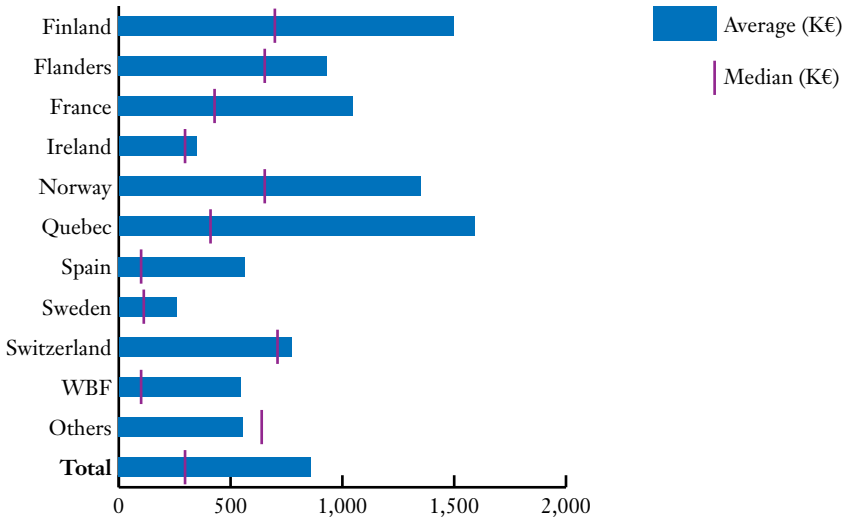
Figure 17. Total festival expenses (average and median) by musical genre



This numerical difference is the widest for rock and pop festivals. While their average expenses are almost twice those of classical or world/traditional music festivals, they are also approximately four times higher than their median expenses. This gap is less noticeable for world/traditional music where the average is 1.7 times the size of the median. Yet, we must take into account extremely large festivals such as Spain's *Rototom Sunsplash*, an international reggae festival (230,000 spectators), Belgium's *Brussels Jazz Marathon* (250,000 spectators), or Norway's classical music festival *Olavsfestedagene* (185,000), not to mention Quebec's norm-breaking events like the *Festival d'été de Québec* or *Jazz à Montréal*, both of which attract more than a million spectators! These festivals also expend more than two million euros, with Quebec's two festivals spending more than ten million euros. From this standpoint, we can conclude that there is truly a fundamental difference in the nature of these festivals.

Despite the impression which Quebec's figures might give us, we can also find small festivals in our sample. Indeed, this diversity in size characterizes all countries, though in different proportions, as we can see below:

Figure 18. Total expenses by country (euros)



In general, the size of the difference between the average and the mean is directly related to the size of our sample groups. The cases of Spain, France, Wallonia, and Quebec taken together provide a good demonstration of this. The discrepancy between the average and the median is by a factor greater than 4! France, notwithstanding its large sample, represents a small exception to this rule, where the average budget is only 2.4 times the median budget. Yet, this is still a considerable difference. In this regard, there is no country where the distribution is relatively homogeneous.

This diversity is also reproduced within each country. In those countries providing a relatively large sample, we have examined the average/median differences in budget with regard to classical music and rock/pop.

Figure 19. Average and Median budgets: 4 countries, 2 music genres (euros)

	Average	Median		Average	Median
Classical			**Rock & Pop**		
France	1,100	325	**France**	1,690	737
Spain	490	111	**Spain**	962	125
WBF	149	99	**WBF**	793	169
Quebec	750	393	**Quebec**	2,052	407

Here we can notice fairly large differences between a median, which expresses the smaller scale common to many festivals, and an average, which is biased by the presence of large festivals. Of course, with the exception of France, this

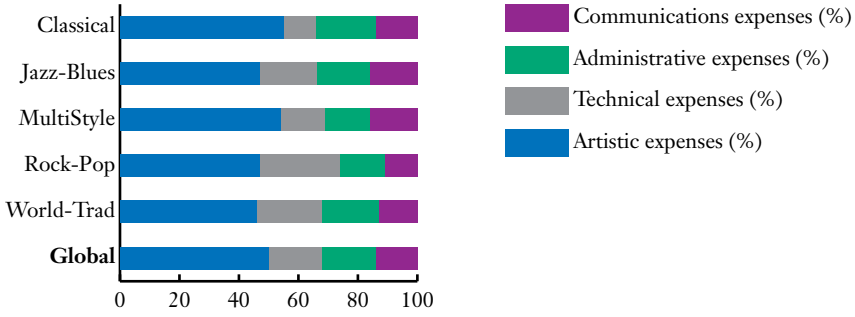
difference is less remarkable for classical music festivals. This is due to the fact that the largest festivals, the budgets of which tend to inflate the averages, are most often dedicated to rock music. In the case of France, on the other hand, only one of the classical music festivals, the *Festival d'art lyrique* in Aix-en-Provence, exceeds 20 million euros and weighs in heavily on the average budget. If we exclude this festival, the average budget for a classical music festival in France would be 592,600 euros, or half as much!

Thus, rather than trying to reduce the disparities between festivals from a financial standpoint, we are forced to accept this diversity as a structural given of festival activity. This should not prevent us from locating constants or identifying outlying phenomena, as we shall do in our study of festival expenses and income.

Expense structures closely tied to musical genre

Our study of how average expenses are distributed has led us to distinguish four categories: artistic, technical, administrative, and communication expenses. In the first category, we have included, besides fees and payments given to the artists, all of the expenses related to the reception and the accommodation of the artists during their stay, these being logically connected to what we consider to be "artistic expenses." Technical and communication expenses need no further comment here, but it should be said that administrative expenses include not only the remuneration of the festival team and running costs but also other elements we were unable to classify in the three previous categories. This is therefore a category which we could entitle "Administrative and Miscellaneous Expenses."

Figure 20. Distribution of festival expenses



The structure of expenses with regard to musical genre shows both points of convergence and divergence. The convergent tendencies reside essentially in how expenses are distributed throughout the four categories: artistic expenses are clearly at the head of the list, followed by either technical or administrative expenses, and finally by communication expenses.

Communication expenses are therefore more limited than what is typically believed to be the case, as we outlined in the introduction to this chapter. We can also note in passing that jazz festivals spend the most on communications.

The largest variances can be observed in the domain of technical expenses. While being very high for rock and pop festivals (representing 27% of their average expenses), they are much more modest for classical music (11%). Some rock festivals must equip their venues for amplified music, and this at times may involve amplification for many simultaneous events (as is the case for the *Dour* festival in Belgium, the *Sonar* in Barcelona, or the *Provinssirock* in Finland). This requirement indicates higher technical costs for rock than is the case for classical music festivals, often taking place in pre-equipped venues (Montpellier's *Radio-France*, Bulgaria's *March Music Days*, or Stockholm's *Early Music Festival*).

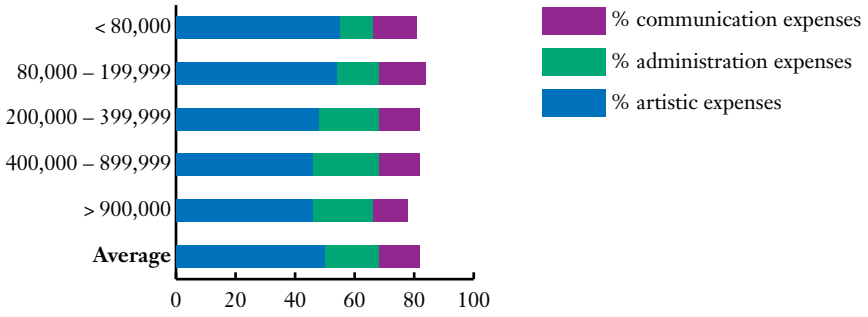
Though classical music festivals have fewer technical expenses, they invest a larger percentage of their budgets in two domains: artistic expenses, clearly at the head of the list, and to a lesser degree, administrative expenses. For the latter, we can see that they are largely in accordance with the age of the festival. The older a festival, the more likely it is to have a permanent staff and a more complex organizational structure. The percentage of its administrative expenses will thus be higher (by an average of around 20% of its expenditure) than it would be for a festival that is less than ten years old (allotting approximately 15% for administrative expenses). When considering that classical music festivals are older than rock festivals (with respective averages of 28 and 15 years), the proportionally higher administrative costs for classical music festivals can be easily explained. These should not necessarily be seen exclusively as an indicator of a higher degree of bureaucratization but also as a sign that their organization is reaching maturity. This is also linked to the fact that much of their festival activity extends beyond their season dates, as is analyzed elsewhere in this study. In other words the dates of its official program do not always include certain concerts, educational activities, or artist residencies, to name a few examples. All of these activities imply an investment of human resources and an organizational structure which increases the administrative budget. We are far from the "off-shore" festival which packs its bags at the conclusion of its program.

Another comment must be made with regard to artistic expenses. In general, the size of these expenses is a sign of the importance festivals accord to signing artists. This shows that these festivals are not merely occasions for marketing, launching publicity campaigns, or providing local entertainment. The high artistic costs also show the dependence festivals have on expensive big-name performers rather than a specific focus on contemporary innovation. As we know, festivals must combine strategies which attract large audiences

(attracting star performers, for example) with their support for emerging genres. As a result, high artistic costs do not necessarily mean that the festival is taking risks by moving away from highly commercial strategies. The contrary is often the case.

Finally, the amount of artistic expenses proportional to the global expenditure is limited by budget size. Indeed, budgets below the 200,000 euro mark have higher proportional artistic expenses than those with larger budgets. This can be explained by the conclusions we have already reached: big budgets are often found in the world of pop/rock where there are higher technical expenses and less pressure to secure big-name artists, even if they seek them out for part of their program in order to attract new audience members. As for small festivals, often oriented toward classical music, they benefit from venues that are easy to equip, have more manageable publicity expenses, and have a small administrative staff, allowing them to pay higher artistic fees than other festivals.

Figure 21. Artistic, administration and communication expenses compared with budget levels



To conclude this analysis of festival expenses, we can see that the most important differences are those linked to musical genres. These determine in part the degree of funding, the type of constraints (technical or artistic), and the main sources of expenditure. This does not mean that national differences are unimportant. When we concentrate on a single musical genre, we can note certain variances in artistic expenses. Thus, Flemish and Walloon rock festivals have higher artistic expenses (58% and 50%, respectively) than their counterparts in France (46%) and Quebec (36%). Spanish classical music festivals devote 60% of their expenses to artistic fees as opposed to 53% in France and 48% in Quebec. This does show important essential differences, but a large part of national variance is here due to a different set of variables. For example, the Spanish percentages can be explained by the fact that the festivals involved are smaller than those in France or Quebec. We shall now turn to festival income sources to see if we will reach similar conclusions.

Festival income particularly sensitive to national traditions

Our analysis here will be brief since an examination of income sizes does not add any fresh insight to the conclusions we have previously reached. In this case, it is the distribution of income sources which captures our attention. In order to study this, we have identified five key factors:

— Ticketing;
— Other festival-generated sources of income (merchandizing, food and drink sales, etc.);
— Charitable gifts from associations of friends of the festival;
— Public funding, government subsidies, and other public sources;
— Sponsorship and patronage;
— Other sources of income (contributions from copyright collectives, various partnerships).

Figure 22. Distribution of financial resources (%)

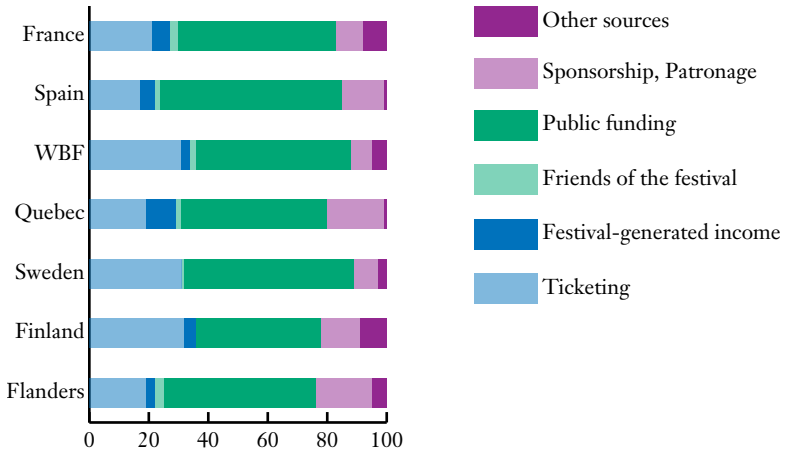
	Classical	Jazz-Blues	Multi-Style	Rock-Pop	World-Trad	Average
Ticketing	22	23	25	**35**	26	26
Festival-generated income	5	7	7	**14**	10	9
Friends of the festival	2	2	3	2	2	2
Public funding	**54**	46	45	31	44	45
Sponsorship, Patronage	12	16	**19**	15	12	14
Others	5	6	1	3	6	4
Total	**100**	**100**	**100**	**100**	**100**	**100**

Here, the diversity of different income sources is as clear as it was for expenses. First, the relative ranking of income sources is not the same for each musical genre. We can clearly see a difference between classical music festivals for which subsidies represent more than half of their total resources and rock/pop festivals for which they do not even account for a third of the total! For the latter, half of the total income is derived from festival-generated income (ticketing and other sources). Jazz/blues and world/traditional music festivals are situated between these two extremes and have comparable income sources: around 45% from public funds and approximately a third from festival-generated income. With jazz and world music, the difference can be attributed to the patronage rate, higher

for jazz festivals, and festival-related income, which is slightly higher for world music. The highest rate of patronage and sponsoring can be found in what we have defined as multi-style festivals, since their programs are not dominated by a single genre, though classical music plays an important role. If these often resemble classical music festivals, here we can see one of their defining features, doubtlessly linked to the appeal that a festival can have for benefactors when it is open to all sorts of musical genres and performances.

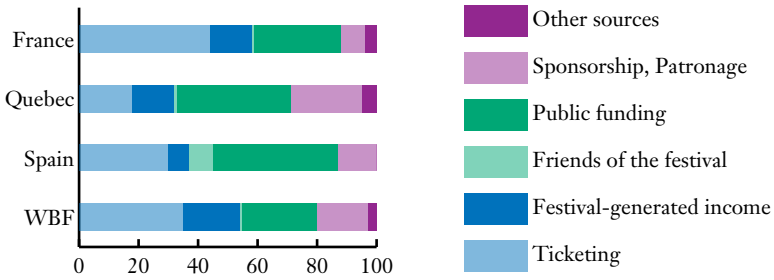
It is interesting to see the degree to which we can find the same distribution of income sources for different countries with large numbers of festivals surveyed.

Figure 23. Distribution of sources of income for classical music festivals in 7 countries (%)



A close look at the income distribution of classical music festivals reveals both a great deal of similarity on some axes as well as a few differences. The similarities are tied to how income sources can be ranked: in all countries, subsidies greatly outrank all other income sources. Likewise, all countries show festival-generated income and ticketing in second place. Here, however, we can begin to see how national variations come into play: in Spain, Quebec, and Flanders, patronage is as important as ticketing. This cannot be explained by strong national traditions of patronage. Rather, this is a question of the low ticket sales that characterize this musical genre. One figure confirms this interpretation: these three countries have the highest rate of free admissions for classical music. For example, the rate of non-paying spectators in Spain is almost twice that of France. Scandinavian countries, on the other hand, hold far fewer free concerts, a practice which explains the proportionally higher rate of ticket sales.

Figure 24. Distribution of sources of income for rock/pop festivals in 4 countries (%)



A different pattern emerges with rock and pop festivals. Festival-related income is proportionally much higher than for classical music festivals because of a lower rate of subsidies. If we add to this the "other income sources" – income which is often closely tied to festival-generated revenue because of specific partnerships or contributions from copyright collectives – we can see a uniformly high rate of self-financing.

There are some national characteristics that upset this average ranking of income sources. France and Wallonia are characterized by a relatively low level of subsidies and a higher rate of self-financing (58% and 54%, respectively). Spain and Quebec show the opposite trend. Moreover, Quebec stands out from the other countries we have studied by its high rate of sponsorship: 24%. This figure becomes rather astonishing when we consider that Quebec's festivals already possess greater income volumes than those of other countries. Thus, the average contributions from patrons or sponsors to a rock festival in Quebec reach nearly 600,000€ as opposed to barely more than 150,000€ for its Spanish or French counterparts.

These figures do not allow us to assume that the economic model for a rock festival excludes governmental support. Being younger festivals on average, they were often created after the first wave of governmental subsidies during a period of economic growth or stability in the West (during the 1970s and 1980s). Thus, they were generally not in a position to benefit from the subsidy levels that we can see with other genres of music. Nevertheless, we can observe that subsidies for rock festivals, though lower than for classical music festivals, remain an essential part of the budget. In our limited comparative study, this is particularly true in Spain where we can see the dramatic impact that the economic crisis has had on festivals.

Indeed, the current economic situation has played an increasingly important part in how festivals devise their income strategies Questions of public funding and new private sources of income have shown the greatest rate of change over the past few years, far ahead of billing choices, musical genre, or indeed

the cultural project of a festival The perception is that these changes in subsidy levels are not uniform.

Figure 25. Trends in public funding (last 4 years) (%)

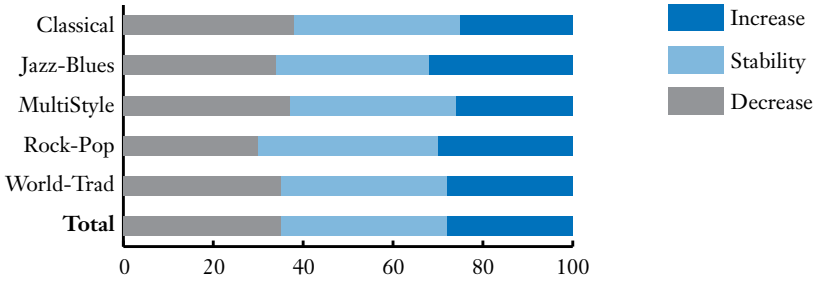
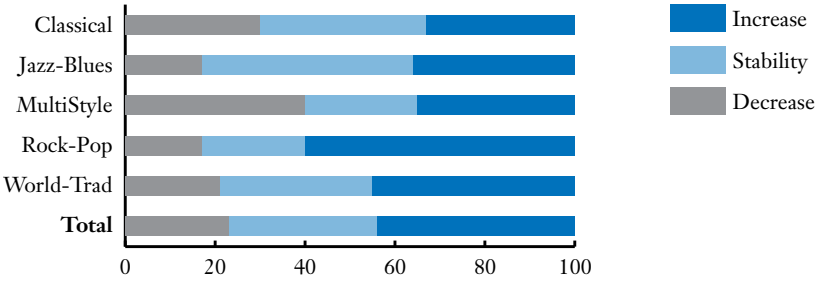


Figure 26. Trends in patronage & sponsorship-based funding (last 4 years) (%)



Globally, the last four years show contradictory trends. The sample can be divided into three roughly equivalent portions showing the growth, stability, or decline of public funding or patronage. An analysis by musical genre does not reveal any significant change in this regard. We are able to see more patronage, especially in the cases of rock/pop and world/traditional music festivals. The latter tend to receive more private funding whereas a decline in sponsorship and patronage is more frequent with classical music and multi-style festivals.

However, two observations can be made. First, we can hypothesize that a substitution has been made for the decline in public funding by an increase in private income sources. If this were the case, the majority of festivals with a lower subsidy rate would benefit from higher contributions from private benefactors. We would thus be able to identify a tendency toward the privatization of festivals. However, this is not the case since the majority of festivals with decreasing subsidies also show a decrease in patronage rates. Likewise, we can frequently observe parallel growth in both areas. We can imagine the festival landscape as follows: rather than a new

distribution of resources, there is a greater concentration of resources on a more limited number of festivals.

The second observation concerns the scale of our analysis. Here, national variation plays an important role. On average, 35% of the festivals studied have experienced a decrease in their subsidies: as much as 71% for Spanish festivals and 74% in Ireland. Yet, this is not uniformly the case: in Sweden the corresponding figure for decrease in subsidies is 4%, in Norway 10%, and 11% in Wallonia. Over the same period, 37% of Finnish or Walloon festivals have shown growth in their subsidies. The equivalent figure of growth in Flanders is only 22% and in France 25%.

The economic crisis, affecting each country differently, has obviously had an impact on public funding regardless of the public policy model adopted by each country (direct administration in Spain, the arm's length principle in Ireland) or the governmental level responsible for financing festivals, which we shall now study.

Governmental levels and heterogeneous public funding

We have seen that public funding has a great deal of importance in the festival economy. However, we must underline one important point. The degree of public funding is not a simple inheritance from the past favoring older festivals while newer festivals must fall back upon the market or patrons. When we correlate the percentage of public funding with the age of the festival, we can see that public funds are also an important part of the budget for many of the newer festivals. These are also more prone to see governmental support as a major priority than is the case for older festivals. However, this mode of financing is highly varied, a fact which draws our attention both to different national orientations and to the specific characteristics of musical genres

With musical genres, the dominant governmental sphere is to be found at the local level – in which we have included all sub-national levels when applicable (French *départements*, Quebec's *municipalités régionales de comté*, Spanish *deputaciones*, different forms of inter-communal cooperation, etc.).

Figure 27. Governmental levels providing funding by musical genre (%)

	Classical	Jazz-Blues	Multi-Style	Rock-Pop	World-Trad	Global
Local	23	**24**	**24**	14	18	**20**
Regional	**21**	16	13	12	**18**	**17**
National	**10**	7	**9**	4	6	**7**
Continental	1	0	0	1	1	**1**
Total public grants	55	47	46	31	43	**45**

We could add that the local/regional level completely dominates funding, with perhaps the sole exception of classical music. The national level barely exceeds

10% of festival resources and 20% of the total amount of subsidies. Classical music, along with multi-style festivals, attracts a higher proportion of state funding. Yet it must also be said that this average percentage is strongly influenced by large subsidies that benefit a very small number of festivals. Indeed, the median for subsidies is situated at 2.5% of the total income.

The national variable provides the most information in terms of the governmental level involved. We have already noted that we must be careful when making comparisons within our sample. Nevertheless, it appears that funding from specific governmental levels is firmly anchored in different national contexts, that is to say the distribution of powers, the size of the country, or the authority granted to each governmental level. For Quebec, in particular, we have had to decide between two positions. If we were to consider Quebec as a nation, we would be forced to conceive of Canada as an international or associative body (much like the European Union). We have preferred to consider Quebec as a regional body in the sense that it is an infra-national level, though *la Belle Province* is de facto a nation. This must be kept in mind when interpreting our conclusions as to the governmental levels involved.

Figure 28. Origins of public funding by country

	Local	Regional	National	Continental
Finland	16.8	2.4	**13.8**	0.1
Flanders	8.9	**19.9**	0.1	0.5
France	**28.3**	13.9	4.3	0.9
Ireland	9.9	8.1	**22.7**	4.8
Norway	9.8	11.6	**29.8**	0.9
Quebec	9.4	16.4	12.6	1.1
Spain	**30.1**	**19.2**	4	0.1
Sweden	19.8	17	10.3	1.3
Switzerland	17	15.6	4.7	0
FWB	6.6	**29.3**	0.3	0.5
Others	23.7	4.3	**27.1**	0
Average	**20.1**	**17.1**	**6.9**	**0.7**

It is remarkable how much the data differs from country to country. The averages obtained when correlating with musical genres are not as striking. The domination of the local level only obtains for four countries: France, Spain, Sweden, and Finland, the last only marginally. These are the "*localists*." A second group of countries privileges the regional level: Flanders, Wallonia, and again Spain. These are "*regionalists*." Finally, a third group can be defined by the preponderance of national funding. The "*statists*" are Finland, Ireland,

Norway, and, surprisingly, Quebec! Indeed, the Canadian federal government maintains a presence in some festivals without necessarily providing hefty financial contributions. Ironically, then, the federal government intervenes more in Quebec's festivals than the centralized French state does within its own territory!

With the exception of Quebec, the national government is particularly important in geographically small countries (Scandinavia, Ireland) while it tends to yield to local or regional authorities in larger countries or in countries in which the constitution limits the central government in favor of regional entities (Belgium, Switzerland). The "other countries," including Bulgaria, Iceland, Poland, Portugal, Lithuania, and Luxembourg (small countries without a strong tradition of decentralization) confirm this territorial and political trend.

Finally, what seems best to characterize the interventions of various governmental levels is their relative homogeneity. The model of local financing is based on the idea of regularity, and here we can find a fairly small difference between the average and the median. The regional model is even more homogeneous. This suggests that the averages obtained for regional funding are not overly influenced by large subsidies granted to a small number of festivals. The contrary appears to be the case for national funding. A small number of festivals do indeed benefit from hefty subsidies. Here we can mention some of the largest festivals, such as the festival of Granada in Spain, the *Cork International Choral Festival* in Ireland, the *Lillehammer Jazz Festival* in Norway, the *festival d'Estoril* in Portugal, or the *Festival d'Aix-en-Provence* in France. But we could also mention festivals like Denmark's *Spot Festival*, the *Festival en chanson* in Quebec, the petit *Festival de musiques improvisées Manca* in France, and the *Suvisoitto* in Finland, a relatively small classical music festival. In short, a high amount of state support can be granted to both big and small festivals alike, regardless of the musical genre of the festival. What characterizes state support is the degree of extreme selectivity underlying its investments.

Subsidies from the European Union, on the other hand, are so infrequent as to be comparable to a winning lottery ticket. It is clear that the European Union is not a player in festival policies from a financial standpoint.

Festival Diversity and Economic Recession

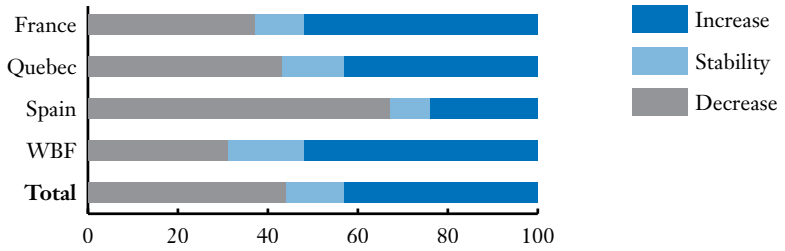
Beyond demonstrating how festival finances are a major force in extending and diversifying the world of music, we have shown in this part how the festival economy remains structurally mixed. The economic crisis affecting Western societies since 2008 has not produced a paradigm shift for festivals. The tendency toward diversification of income sources is directly related to increased pressure on public funding. The level of funding differs from genre to genre. Classical, jazz/blues, and world/traditional music generally receive more financial support from the government than their cousins in the world of pop/rock. But funding differs especially from country to country, an

element that becomes apparent when we focus on the different governmental levels. With a few exceptions, local and regional governments are dominant. The variations that we have seen in terms of governmental support are tied to three factors: the size of the national territory, its political system, and the criteria governments use to allocate funding, determining the selectivity of its financial assistance. This latter factor is addressed in more detail in the second part of this work in its country-by-country analysis.

The variable of festival nationality, expressed in comparative terms, partly explains the source of financial income. However, we have shown that this variable has less of an impact on festival expenses, as they are generally more influenced by musical genre and budget size. National income, artistic outcome, this is the economic trajectory of festivals – an economy which has been unstable since 2008.

The effects of the economic crisis vary according to the country. Lower levels of public funding affect a much greater number of festivals in Spain and Ireland, which were also the first countries hit by the recession within our sample. When we analyze the 2012 figures for the countries that have furnished a sufficient amount of current data, we can conclude that this recession, which some consider to be spreading ineluctably, does not affect the entirety of our sample. Indeed, this appears to be far from the case.

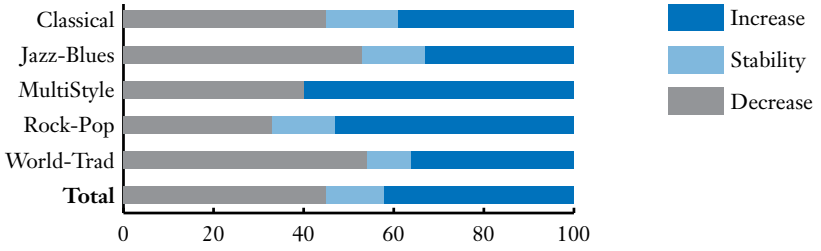
Figure 29. Budgetary trends by country (2008-2012) (%)



The above figure presents three possible situations. In this first of these, half of the festivals spent more in 2012 than they did in 2008, with only a few festivals displaying continuity in their budgets, as is the case for France and the Wallonia-Brussels Federation. The second situation is faced by Spain where a high number of festivals have decreasing budgets, but a quarter of them are showing marked budget increases, and again very few festivals showing stability. Finally, Quebec illustrates the third possibility, with a little more stability and roughly the same number of festivals showing budgetary increases as there are showing decreases.

Not only does the impact of the recession differ from country to country, but it also varies for all festival categories. Festivals with decreasing budgets belong to all musical genres and all budget sizes. Some trends have, however, emerged from data amassed in surveys conducted up to 2012.

Figure 30. Budget trends and music styles (2008-2012) (%)

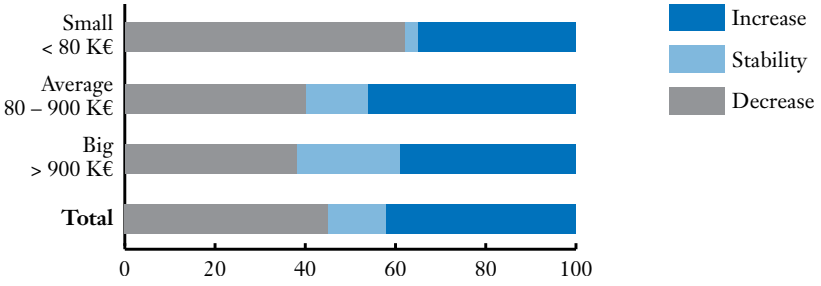


The first of these is that, for a large majority of festivals, the growth of their activities, audience sizes, and budgets was stable until 2011, well beyond the beginning of the crisis in 2008. During this three-year interval, festivals with decreasing budgets could therefore not attribute this to the general economic context but rather to factors tied to their specific environment. Between 2011 and 2012, however, one can observe a decrease in resources. Globally, festival expenses no longer display an increase, but this general stagnation hides different trends that can be found when looking at festival type.

Analzing the interaction of festival finances (decrease, increase, budgetary stability) with musical genre reveals this. Indeed, the festivals that have been the most affected are jazz/blues and world/traditional music. Classical music festivals are just as likely to have suffered a budgetary decrease as they are to have benefitted from an increase. Multi-style and rock/pop festivals, on the other hand, show a higher rate of budget increases in 2012.

Tabulating budget trends by budget size allows us to discern whether the larger or the smaller festivals display the most stability.

Figure 31. Budget trends and budget sizes (2008-2012) (%)



Even if there is no unilateral direction of movement in terms of budgets and musical genres, the tendency is nevertheless interesting to observe. On the one hand, small festivals have suffered the most from the economic crisis. 62% of festivals with budgets below 80,000€ have shown a decrease in their

financial resources. On the other hand, the larger festivals (with budgets in excess of 900,000€) may not only show fewer budgetary decreases (39%) but they may also display more budgetary stability (23%). In other words, the budgetary crunch is felt the most at the two extremes, while the other festivals, representing a majority, are just as likely to show a budgetary increase as they are a decrease. Consequently, it appears that large festivals can handle a resource shortage by adjusting their budget without putting the festival itself into jeopardy. The same situation represents a clear and present danger for small festivals, as they do not have the same financial means and thus the same degree of flexibility as their larger counterparts. It must be noted, however, that stable festivals have become rare over the 2008-2012 period. Change (whether positive or negative) is the defining feature. It gives the festival economy a rather "Darwinian" appearance, of the struggle for survival without any real regulation, and this despite the significance of public funding, as we have already seen.

A reading of the chapters dedicated to each nation will allow us to study these issues in a more specific context. Generally, though, this absence of a general rule leads us to believe that macro-economic trends have varying impacts on the festival economy. Indeed, these impacts are either amplified or dampened by the specific local frameworks in which a festival functions, including the countries (Spain, Ireland) for which the economic difficulties have been the most striking.

Chapter 3.
Cultural Project and Artistic Programming

A (music) festival is by definition "ideal," that is to say an artistic expression set within the framework of a cultural project. The latter integrates several types of general objectives characterized in the following ways: first, there are artistic objectives such as discovering new repertories or supporting the creation or development of a unique artistic style; second, there are cultural objectives such as making cultural activities more accessible or encouraging and strengthening intercultural dialogue; third, there may be objectives oriented toward local development such as enhancing touristic appeal or bolstering local production.

The strong growth of this type of cultural transmission over the past 15 years has created a high degree of competition between festival organizers in terms of proposing new programs, attracting audiences, and obtaining the necessary funding. Does this development challenge the "ideal" nature of festivals with regard to the objectives they have chosen to pursue? How can we define the main characteristics of what festivals offer through their programming? What are the most important issues confronting festival organizers today and what development strategies have they put into place to respond to them?

This chapter will offer several answers to these questions. Our supposition is that competition, even when it sometimes gives us the appearance of being unbridled, does not currently fundamentally change the ambitions and cultural projects of festivals. Instead, this dynamic leads organizers to reaffirm their cultural projects as they search for innovative and original programming to differentiate themselves from their competitors.

Festival objectives

We have asked festivals to indicate their four main objectives out of a list of 17. We then asked them to mark four secondary objectives they also wish to pursue. Globally, the data indicate that artistic objectives are the most important (49%), specifically in terms of discovering new artistic works and supporting the emergence of new styles. These main objectives correspond primarily to the mission that festivals have put forward for themselves with respect to the artistic world and their audience. They also reflect a festival's constant need to develop an original program in order to remain competitive, with each season's program tending to include new, hitherto-unheard music.

The cultural objective is in second place (31%), with a priority on making culture more accessible through encouraging public education and knowledge. For all festivals surveyed, the democratization of culture is a common element. It manifests itself in terms of ticketing policies and programming. As a result, a good number of festivals are open to other artistic domains and develop, both prior to and after the festival season, collaborative links with educational and other organizations (cf. the figures below).

The objectives targeting local development are in third place (21%), showing the importance which festivals accord to their local socio-economic environment and the image of a region or even its identity or its economic recovery. The specific objectives relating to regional development via culture or touristic appeal constitute the third meaningful set of objectives. Here, some festivals look to stimulate commerce, job growth, and charity work in order to benefit local residents. In some cases, the local economic benefits brought by festivals are seen as compensation for the possible nuisances they create (noise pollution, a massive influx of festival-goers, road congestion, etc.).

A comparison by musical genres shows the same global ranking of these categories of objectives. Nevertheless, the most important relationships vary by genre, with classical music privileging artistic objectives (unveiling new repertoires and celebrating or rediscovering a musical heritage) while rock and pop tend to prioritize new artists. Cultural issues are given more weight in world and traditional music (51% for the strengthening of intercultural dialogue), whereas entertainment is a major objective for rock/pop festivals (43%). The local objective also strongly characterizes rock/pop in terms of stimulating the local economy. This characteristic is probably due to large festivals for which many audience members camp on-site and create a demand for local commerce (grocery stores, bars, restaurants, etc.).

An analysis of secondary objectives shows other trends for musical genres. In some ways, they complement the primary objectives, thus demonstrating that all musical genres find these categories of objectives to be important. The second significant objective for classical music is cultural in nature (46% for promoting education and the musical exposure of audiences). Jazz and blues strongly emphasize regional development via culture (23%), and rock/pop privileges emerging artists (35%). World/traditional music festivals have more cultural priorities in terms of making culture more accessible (28%) whereas multi-style festivals place artistic objectives in second place, with an emphasis on celebrating or rediscovering musical legacies.

Figure 32. Main objectives by music styles (%)

Objectives	Classical	Jazz-Blues	Rock-Pop	World-Trad	Multi-style
Discovering new repertoires and works	**45**	11	22	15	6
Developing a specific artistic style or field	45	13	21	18	3
Celebrating or rediscovering musical heritage	**64**	6	7	18	4
Providing a platform for professional/ market-based exchanges	25	4	38	29	4
Promoting collaboration between artistic disciplines	43	6	23	23	6
Supporting artists with innovative projects	38	19	26	15	2
Supporting emerging artists	28	17	**37**	16	1
Artistic objectives	**49%**				
Encouraging and deepening multicultural dialogue	29	8	7	**51**	5
Stimulating exchanges between professionals and amateurs	32	18	26	15	9
Promoting education and the musical exposure of audiences	41	17	17	20	5
Making culture more accessible	40	16	26	12	6
Providing leisure and entertainment activities	21	12	**43**	20	4
Cultural objectives	**31%**				
Supporting local production	16	16	**42**	20	5
Developing touristic appeal	35	12	28	17	9
Encouraging regional economic recovery	31	25	19	19	6
Developing a region culturally	45	10	23	15	6
Strengthening local identity	39	11	21	18	11
Local objectives	**21%**				

We can ask ourselves whether looking at objectives country by country will show different results in terms of these priorities. First, we can see that the

same ranking obtains globally (artistic objectives followed by cultural and then territorial objectives). We can then observe that Spain and Quebec distinguish themselves from other countries by the importance they place on local objectives. These are in second place, just behind artistic objectives. For Spain, the importance of local objectives (expanding touristic appeal, developing a region culturally, strengthening territorial identity) can be explained by the fact that a large number of festivals are held in cities with less touristic appeal and, according to the legal status of the festival, the festival organizer and public sponsor are more "politically" attentive to the local economic impact of a festival. In Quebec, the dual objectives of economic recovery for areas facing hardships (31%) and touristic appeal (22%) are seen as important for a certain number of festivals. As an example, consider the *Festival des guitares du monde* at Rouyn-Noranda (Abitibi-Témiscamingue), a mining town far removed from large urban centers that has been encouraging a festival dynamic since 2000 (several festivals over the course of the year, both in music and cinema) in cooperation with local industries. As a result, it has experienced a growth of touristic appeal and can measure its economic impact, notably within the sector of tourism. More generally, territorial objectives are expressed through the partnerships festivals have developed with local institutions and associations, particularly those dedicated to education, culture, and social work (cf. the chapter "Cooperation"). Flanders and Norway upset this hierarchy by making cultural objectives their first priority. These include cultural accessibility, entertainment (for Flanders), or public education (for Norway). Even though it is possible to discern general trends characterizing each country, it is important to remember that festivals implement their projects within a nexus of objectives in which artistic, cultural, and territorial goals are always represented but given different weight. There are no festivals, then, which can be described as purely artistic, cultural, or territorial. Rather, festivals must constantly take into account their local context and artistic quality as well as show a heightened sensitivity to their audience members.

The objectives and mission which festivals pursue show a strong degree of overall stability. Indeed, nearly 70% of them indicate that their objectives have not changed (40%) or have changed minimally (24%) over the past four years (2008-2011). This stability does not appear to be threatened by a more competitive festival environment. On the contrary, this has had the opposite effect, encouraging festival organizers to reaffirm their originality in order to distinguish themselves from competitors. It is important for festivals of the same musical genre and operating within the same small or medium-sized territories to show their uniqueness. This uniqueness is of course found in the programming but also in the activities and the general ambiance each festival organizer strives to create. For example, some festivals encourage their familial or intergenerational character by creating activities targeting the

appropriate demographic groups. Others privilege ethical values by providing a venue for associations of villages or incorporating practices of sustainable development. Here, they put into place recycling programs, promote organic products, regulate the noise level, or set a maximum audience size, among other strategies.

Sources of inspiration and the development of the musical program

The choice of musical program determines the artists billed for the festival. If a few festivals attract audiences because of the comforts they offer or the special atmosphere they cultivate, festival-goers choose their venues especially for the music being offered.

A festival's programming is not determined without a great deal of reflection. Whether in terms of choosing emerging artists or evaluating the quality of an original work or an innovative performance, the creation of a program depends on the work of professionals constrained by a number of strategic, financial or organizational imperatives. A festival's program generally represents long months, even years, of hard work combining a deep understanding of the current musical landscape, personal research, involvement in other festivals, and the elaboration of professional networks. The artist list is the result of a process in which financial considerations are an important element but certainly not the only factor. Indeed, we have already seen that one of the greatest challenges for festival organizers is discovering emerging artists or new works. Of course, this can be linked to financial concerns since billing a young artist is generally a less expensive option. However, there are other forms of capital in play here: the choice of an emerging artist can contribute to the reputation of the festival which can pride itself on having played a role in launching his or her career. Finally, depending on the country, supporting an emerging artist can represent a criterion for governmental support via its cultural policies.

The three main sources of inspiration most often cited by festivals as being factors when creating their programs are the following, in order of importance regardless of musical genre: proposals from artistic groups (17%), previous collaborations and contacts (13%), and discussions with other professionals (11%). Taken together, these main sources of inspiration form three categories which each characterize a specific way a festival functions. First, we can discern a model based on "networking," defined by the importance of professional contacts and advice from artistic directors, which represents 40% of the sources of inspiration for festivals. It is followed by a model based on "reception" (37%), which relies heavily on proposals coming from artistic groups and on the preferences of the public. Finally, the "research" model (23%) depends on a proactive attitude and can be explained by involvement in other festivals as well as concerts held throughout the year.

When we relate our results to musical genres, these three sources of inspiration have widely different weights. The "networking" model dominates

classical music festivals whereas the "reception" model is dominant in rock/pop. Jazz/blues, world/traditional, and multi-style festivals tend to lend equal importance to "reception" and "networking", while the "research" model remains in third place for all musical genres.

Figure 33. Sources of inspiration and music styles (%)

Main sources of external inspiration	Classic	Jazz-Blues	Multi-style	Rock-Pop	World-Trad	Total
Advice from other artistic directors and critics	**10**	**10**	9	7	5	**8**
Programs from networking	3	6	5	3	6	**4**
Previous contacts or collaborations	**17**	10	**18**	7	14	**13**
Discussions with other professionals	**13**	10	5	12	11	**11**
Networking						**40%**
Reception of proposals from artistic groups	**19**	17	**20**	13	**19**	**17**
Information from distribution agents	6	14	9	13	11	**10**
Audience feedback	4	5	7	**12**	7	**7**
Reception						**37%**
Involvement in other festivals	5	9	7	8	8	**7**
Involvement in regular programming	7	8	4	**10**	9	**8**
Viewing other festivals	4	2	9	3	1	**3**
Internet research	2	5	4	5	4	**4**
Research						**23%**

An analysis based on musical genres reveals that classical music festivals are more prone to using previous contacts and collaborators, the advice of fellow artistic directors and critics as well as other sources of inspiration. The latter are essentially linked to a particular theme, a concept imparting meaning to a festival, or the scenography for the entire festival chosen by its organizer. The category of rock/pop privileges a proactive approach with involvement in concerts throughout the year and a high degree of receptivity with regard

to audience feedback. Indeed, some rock festivals carry out a dialogue with their audiences via their websites and social networking sites, conducting surveys and collecting information about billing and programming preferences. Organizers and audiences can recommend artists for whom "hip" festival-goers can then vote. This process reinforces audience fidelity and, in some ways, guarantees audience participation in the festival. This type of interactivity can equally be connected with the fact that our group of rock/pop festivals contains a large share of private, for-profit festivals (35%) for whom the management is more clearly influenced by a market-oriented model. Here, this represents a marketing model in which organizers desire to offer a product that, in addition to its artistic merits, will be profitable.

The distribution of these sources of inspiration by country shows different sensitivities in this general hierarchy in which the "networking" model ranks first, followed by the "reception" model and then the "research" model. Thus, it is the "reception" model which displaces the other two models in Spain, Quebec, Flanders, and the Wallonia-Brussels Federation, essentially in order to field proposals from artistic groups, with Flanders also relying on audience feedback. In Ireland and Norway, "networking" is the most important model, and "research" is in second place, essentially through participation in other festivals.

When we compare these different sources of inspiration, we can nevertheless see that the dominant characteristic synthesizing these approaches, broadly seen throughout musical genres and countries, is one of exchange. By this, we first of all mean exchanges between festival professionals, then with artists and audiences. A festival's program is never decided by an individual working alone. Studying the programs of other festivals and carrying out on-line research are not important sources of inspiration (3% and 4%, respectively). If a festival has a management team for program development, it is often aided by a programming committee and a fairly structured network of advisors in establishing the festival's program. Here, a program is the result of meetings, festival participation, and formal or informal network contacts which both individuals and organizational teams have constructed and maintained in some cases for a long time.

Dominant and secondary musical genres in festivals

To facilitate our analysis, musical genres have been combined into five main categories, as we have already seen, with each festival being classified according to its prevailing form of music. These broad categories have been created on the basis of 13 possible options among which festivals must choose both a primary and secondary genre. These categories thus mask possible permutations and sub-genres.

Figure 34. First and second genre choices in Classic and Rock & Pop festivals (%)

	Classic 1	Classic 2	Rock-Pop 1	Rock-Pop 2
Medieval, Renaissance	**7**	**14**		1
Traditional, Folk	3	8	8	9
Baroque	**22**	**12**		1
Classical (18th to 1950)	**32**	6	1	2
Lyrical Music	**10**	**10**		
Contemporary Music	**16**	**19**	2	3
Metal, hardcore			**7**	**12**
Reggae, ska			4	**13**
World Music	4	12	7	12
Pop, Rock	1	2	**34**	4
Jazz, Blues	3	12	3	11
Techno, Electro		2	**15**	**12**
Rap, hip hop			**9**	**13**
Other	2	3	**9**	**9**

Unsurprisingly, all musical genres concentrate their primary and secondary choices within the same esthetic universe. The second choice often complements the first as a means of creating and consolidating the main style of the festival. The style of program development remains relatively compartmentalized, as we can see in the above figure. The worlds of classical music and rock/pop are almost mutually exclusive, though world music and jazz/blues festivals show more openness toward classical music. Likewise, rock/pop festival programming occasionally includes folk and traditional music. Turning to the figure below, we can see that jazz/blues represents the dominant style within its category as first choice, with a second choice leaning toward world music (22%), rap and hip hop (16%), as well as rock (13%). World/traditional music festivals also privilege their own genre as first choice, with secondary choices of techno-electronic music (16%) and rock/pop (13%). As for multi-style festivals, they include a combination of particular styles without a single dominant genre, though classical music and jazz are mentioned slightly more frequently.

If this description seems to partition musical styles somewhat rigidly, it must nevertheless be stressed that a number of festival organizers show an interest in mixing genres by scheduling a concert which deviates from the dominant style of the festival. Similarly, rock and pop artists include more and more contemporary classical artists in their performances. Thus, it is sometimes possible to go to a rock concert while attending a classical music festival or vice versa. At this point in time it is difficult to determine whether this is merely an ephemeral phenomenon or the beginning of a long-term trend in programming strategies. We can take as examples the rock/pop festival

Les Nuits Botaniques (FWB) which includes a concert of classical piano music or the *Mondial Loto-Québec*, a multi-style festival which offers a mixture of genres both during concerts and in its overall program by combining rock/pop, symphonic orchestra, and choral groups.

Figure 35. Diversity of musical repertoires & music styles (%)

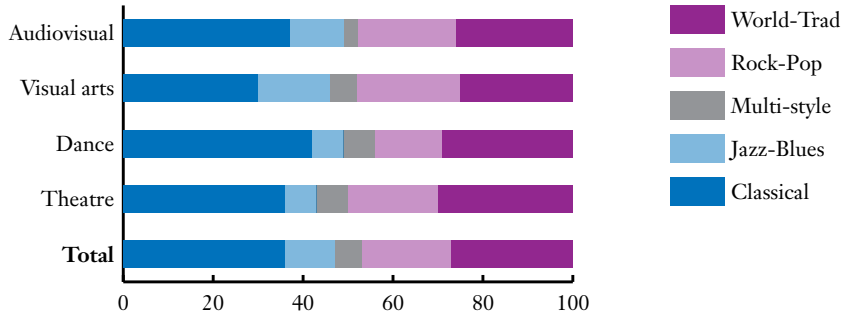
	Classic	Jazz-Blues	Multi-style	Rock-Pop	World-Trad	Total
Medieval, renaissance	**7**	1	4		1	**3**
Traditional, Folk	3	2	11	8	**26**	**8**
Baroque	**22**		11		1	**9**
Classical (18th to 1950)	**32**		**26**	1	3	**15**
Lyrical music	**10**		2			**4**
Contemporary music	**16**	2	5	2	4	**8**
Metal, hardcore				**7**	1	**2**
Reggae, ska		2		4	**7**	**3**
World music	4	12	9	7	**35**	**11**
Pop, Rock	1	11	7	**34**	8	**13**
Jazz, Blues	3	**61**	**18**	3	8	**10**
Techno, Electro		1	2	**15**	1	**5**
Rap, hip hop				**9**	1	**3**
Others	2	6	7	**9**	4	**5**
Total	**100**	**100**	**100**	**100**	**100**	**100**

It is within the dominant genre that we can see the broadest combinations of particular styles. Excluding multi-style festivals for which this is the defining characteristic, the festivals under the classical heading and characterized principally by classical music (18th century – 1950), baroque, and contemporary music offer programming which mixes different styles. Likewise, rock/pop festivals include combinations of styles which mix techno/electronic music and rap/hip hop with metal. As for world/traditional festivals, they also schedule ska, rock, and reggae concerts.

This diversification of musical styles is accompanied by multidisciplinary cultural activities in more than 63% of the festivals studied. Indeed, the cultural and artistic objectives which we analyzed earlier are not limited to the musical offering. Promoting interdisciplinary collaboration between different artistic fields is indicated as a primary objective for nearly 9% of the festivals, with 15% choosing it as a secondary objective. Here, this is an expression of a real desire to support emerging artists while at the same time broadening public exposure to different artistic disciplines. This combination can principally be

seen in the disciplines of dance (30%), visual arts (26%), cinema and audiovisual production (26%), and theatre (18%).

Figure 36. Other activities and music styles (%)



When analyzing this data by musical genre, we can see that classical music (36%), world/traditional music (27%), and rock/pop (20%) express the highest degree of interest in these disciplines. For many festivals, there is an audiovisual component which provides a backdrop to the regular programming, with multi-media works projected onto giant screens. However, it is more within the world of classical music festivals that dance, theatre, and visual arts play a significant role. Heritage sites, the preferred venue for 64% of classical music festivals, doubtlessly explain the more visible presence of these disciplines, as the setting provides a rich medium for these artistic interventions. World/traditional music also provides an outlet for dance and theatre. The traditional component of these latter musical genres, laying great emphasis on folklore and world music, emphasizes the corporal expression so inherent to dance more than would other genres. The importance of theatre is largely due to activities for children and younger audience members, but not exclusively so. Many festivals classified within this category promote a cultural project which confirms their political and educational agendas (thus the presence of associations of villages, for example, which include non-profit organizations responding to globalization-related issues). These are particularly concerned with intergenerational integration and offer diversified cultural events which privilege fanfare, street art, or performance art.

The distribution of these artistic disciplines by country shows that this diversification, though present everywhere, does vary internationally. The two disciplines the most present in Spain, France, and the Wallonia-Brussels Federation are the audiovisual sector and dance. For the other countries within our sample (Quebec, Sweden, Ireland, Finland, Flanders, Norway, and Switzerland), visual arts and dance are also at the head of the list, with an average varying from 23 to 27%.

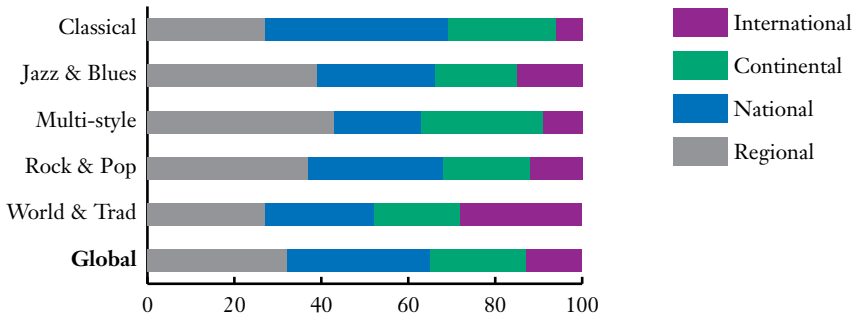
The geographical origins of the artists

The diversity of the music being offered is, of course, also reflected in the geographical origins of the artists. The following data reveals a fairly surprising geographical distribution roughly divided between two large blocks for all musical genres. The first of these consists of regional or national artists, while the second is made up of European or extra-European artists. This geographical breakdown seems to indicate a subtle balancing act between the objectives and issues we studied earlier: artistic and cultural objectives, issues, and festival financing. The dilemma which program development creates for festivals leads them to make choices linked both to their regional and national involvement and to their presence on the continental and international scenes. The effect of this is that the average proportion of regional and national artists is relatively stable. Globally, this accounts for roughly 65% of the artists for all musical genres: classical music (69%), jazz/blues (66%), multi-style (63%), and world/traditional music (65%), with rock/pop showing a slight difference from other genres (71%). The non-national origin of artists (35%) shows the same trend, representing around a third of the billing. For fairly obvious reasons, world/traditional music deviates from this trend, especially with world music where the purpose is to welcome artists from outside Europe or, in the case of Quebec, outside the continent.

Our data does however display variations when analyzed in terms of specific genres. Jazz/blues, multi-style, and rock/pop present a higher degree of regional participation. This imparts a different flavor to these festivals than is usually imagined, namely large events with big-name international artists. If these latter events play an important part in the expenses for rock festivals, local and regional artists are very significant in terms of the overall number of artists being billed. Here we can see the importance that rock/pop festivals give to local production when setting their objectives. Classical music tends to privilege national artists (42%). The continental origin of artists is highest for multi-style festivals and balances out to 20% for the other musical genres, classical music showing a slightly higher presence (25%). Extra-European artists necessarily dominate the billing in world/traditional music and have a higher than average presence in jazz/blues.

In the first place, the general averages of these proportions for the regional/national level (2/3) and the continental/international level (1/3) are thus linked to differences in musical genre. However, the territorial dimension also has an impact on our data. For example, 70% of the artists in Quebec's festivals are "regional," though here we are concerned with the entire province and thus with a "national" entity. Another territorial influence can be found in the demographic size of a country. A smaller country will naturally have a smaller internal market for national artists and thus a larger presence of international artists.

Figure 37. Origin of artists by musical genre (%)



The characteristics which we briefly studied above show that what we consider to be a festival cannot be limited to the intensive activity of its peak season with no connection to its location and audience. On the contrary, we have seen that a festival's preoccupation with artistic quality, audience feedback, and its local context is indeed real and is expressed in its cultural project. The following chapters will show that this can also be seen through the partnerships a festival can forge with educational bodies as well as with cultural institutions and service providers. A fair number of festivals can also take advantage of permanent local or regional venues or structures which provide them with a continuing organizational framework. Programming choices are still based on social exchanges and networks, first within the festival team or a professional network and then in interaction with a festival's audience members. The main issue facing festivals remains the discovery of new artists or works and innovative approaches, without systematically excluding the big-name artists who attract audience members. A festival also provides a spatial and temporal framework within which artistic offerings are both concentrated within a musical genre and, as we have seen, open to other styles and different artistic disciplines. Finally, this diversity is also present in terms of the geographical origins of artists and displays a tendency to prioritize regional and national artistic production. A festival's organization, its billing, and its parallel activities are the result of subtle combinations with which it experiments in order to establish its identity and to forge its originality. Its goal in doing so is to render itself different from its competitors and to tackle the economic issues it faces. The financial side of a festival has an important role to play in its artistic choices and its strategies with regard to audiences. The growing amount of competition between festivals does not seem to transform them into purely "commercial" products but rather, for a large majority of festivals, it leads their organizers to concentrate on placing them more firmly within a specific cultural and artistic dynamic.

Chapter 4.
Festival activities

We shall begin by presenting the received view of festivals, often propagated by the media. Preceded by heavy advertising and promotion, the festival season arrives with the coming of summer. Festivals condense their programs into a few days with an impressive list of concerts, while from the end of June through to the beginning of September, each festival follows closely upon the heels of its predecessor. The festivals provide a vacation destination for young people who choose to "do" a few of them. The festival season can thus be summarized in four words: summer, vacation, concerts, and crowds. Yet we will see in this chapter that this image does not always correspond to the reality of the festival landscape. Thus, if the concert is the kernel of festival activity, it is surrounded by other activities which, though not highlighted in the program, are nevertheless an essential part of the festival dynamic. These activities, though they receive less media attention, are conducted at a different pace and often situate the festival within another time frame, one which is anchored within a local and regional context.

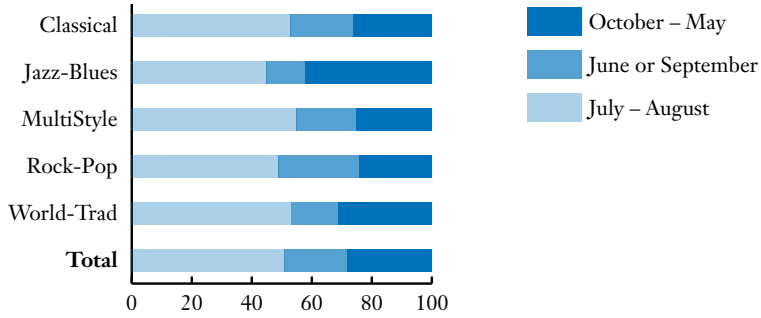
Earlier in this work we discussed the degree to which music festivals are open to other artistic disciplines: theatre, dance, audiovisual displays, and other media. Festivals are thus not restricted purely to musical offerings. Indeed, there are other initiatives festivals put in place outside their peak season in order to achieve their cultural objectives. Master classes, conferences, artist residencies, and local educational partnerships, for example, are also part of a festival's program and take place throughout the year. In this chapter, we will look more closely at these initiatives and, in conclusion, examine their general evolution to see whether they have been affected by the budgetary restrictions in public funding set off by the 2008 crisis.

Is there a festival season?

As we already know, half of the festivals are held during the summer season (51%). The "winter" period nevertheless covers 28% of the festivals, with the remaining 21% taking place in June or September. Such a heavy concentration of events is, of course, understandable given that the summer period represents vacation time for many Europeans and that it is the most clement season for holding events in the open air or under canvas. We can note two aspects about this trend in favor of the summer. First, the percentage does not vary greatly in terms of musical genre. Around half of all festivals take place during this time span. Second, even though the summer is considered to be the season *par excellence* for festival activity, it does contain only half of the festivals. What are the defining characteristics of summer festivals? On the one hand, these are festivals with large budgets. Their average budget is in excess of one million euros,

while that of "off-season" festivals is under 500,000€. These are also older festivals (with an average age of 23 years as opposed to 19 for festivals held between October and May). This leads us to a three-fold explanation. The first is that summer programming is highly attractive but presents an obstacle: the festivals involved are well-entrenched, older, and have a firm grip on this season. The second concerns budget sizes. In this respect, summer festivals are the most well-endowed because the outdoors events that most often characterize them are also very expensive. We can also note that jazz festivals, which are most frequent during the "off-season" (42%), generally have lower expenses.

Figure 38. Seasons and musical genres (%)



Clearly, geography has a large influence on the season of year. If we combine the four months running from June through September, we can find two-thirds of our festivals. However, this trend is accentuated in countries with long and harsh winters like Finland (95%), Quebec (85%), and Sweden (82%). Flanders also presents similar figures (84%). Spain, on the contrary, is the country with the highest number of winter festivals (39%), regardless of musical style. The choice of dates is thus a strategic one influenced by the general volume of and competition between festivals. Facing the older and more legitimate festivals that have a strong hold on the summer season, there are the "pretenders" who are slightly younger but almost as powerful in terms of budget and who have had to settle for the fringes of summer (June and September), and the "outsiders" who have deliberately chosen another time period and a more urban setting, taking advantage of permanent venues or compensating for the lack thereof.

Short time spans?

The other received notion concerning festivals is that they take place during a short span of time. This facet of their identity is related to two distinct questions. The first involves the duration of a festival and how this has changed since 2008. The second is related to the number of concerts and the

intensity of festival programming. This depends on several variables, such as musical genre and country. We will analyze these changes over the course of the 2008-2012 period.

For a few more days…

The length of festivals is closely linked to the dominant musical genre. As we can see in the following figure, the extent of change from 2008 to 2011 is relatively small. When it does exist (in jazz/blues or world/traditional), it is generally upward in nature. On the other hand, it is interesting to note that the time span is much longer for classical music or multi-style festivals than for rock/pop or world/traditional. This corresponds to a different format: a single daily concert for classical music or many different sets over a single day for rock, for example.

Figure 39. Number of days of programming and musical genre

	2008		2011	
	Average	Median	Average	Median
Classical	14	11	14	11
Jazz-Blues	8	6	9	6
MultiStyle	12	10	14	11
Rock-Pop	6	3	6	4
World-Trad	7	5	8	5
Global	**10**	**7**	**10**	**7**

The gap between the median and average figures is fairly moderate for classical music. This means that there are few classical festivals which deviate significantly from the average time span. Some exceptions would be Reims' *Flâneries Musicales* in France, Flanders' *Van Vlaanderen Vlaams-Brabant*, Brussels' *Festival des Midis-Minimes*, or Spain's music festival of the Canaries, all of which last a month or more.

This gap between median and average is much wider for rock/pop, however, indicating a standard length of three days or a little longer. Long rock festivals are exceptional, like the *Nuits de Fourvière* in France or Barcelona's *Mil.lenni*, and artificially inflate the average length to 6 days.

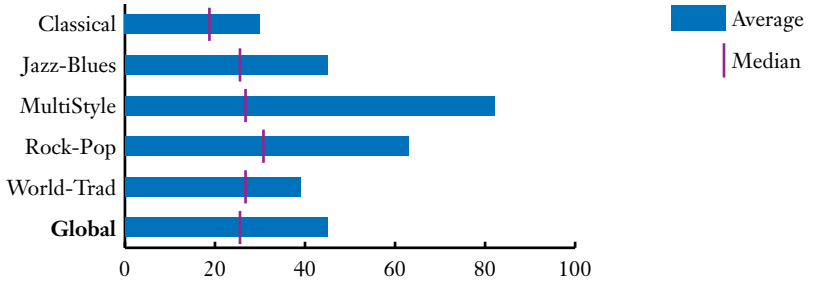
Looking at the national variable does not yield much additional information. Yet, all others things being equal, we can see that that festival length tends to increase in accordance with a country's population size. Generally, in a less populated country, programs tend to be more concentrated in a short time span, as is the case for Norway, the Wallonia-Brussels Federation, or Ireland. Larger countries display the opposite tendency, as in Spain or France. But this

variable remains secondary, musical genres having a much larger influence and providing timeframes largely shared by everyone.

How many concerts?

The intensity of the musical program and the presence of big-name acts are often seen as means of garnering publicity for festivals. How does this break down in terms of musical genres and is this variable systematically linked to concert frequency?

Figure 40. Number of concerts in 2011, by musical genre



In 2011 the number of concerts per festival averaged 45. The significant gap between this average and the median (25) shows the degree to which this figure varies. For classical music, this degree of variation goes from 7 concerts in one festival to 202 in another (*Olavsfestdagene* in Norway), while for rock/pop, it extends from a few concerts to 525 (*The Dublin Fringe Festival* in Ireland). Substantively, this diversity is robust. In rock/pop, small festivals attracting fewer than 1,000 people can schedule up to 90 concerts in rural areas (*Norbergfestival*, Sweden) while the biggest festivals program 10 concerts (*Festour*, Spain) with 80,000 admissions. One can find the same variations in classical music with the *West Cork Chamber Music Festival* in Ireland which programs 44 concerts for an audience of 1,000 while the *Chorégies d'Orange* holds 7 concerts for an audience of 30,000.

Based on the median, it is with rock/pop that we can find the most concerts (32). This genre thus supports the conventional view of a festival with several concerts condensed into a few days. At the other extreme, classical music has the lowest median (19). The difference between classical music and other genres stems from its style and rhythm: fewer concerts per day but also, as we shall soon see, more artists per scheduled concert.

Between these two poles, we find that multi-style, jazz/blues, and world/traditional music have similar medians. In multi-style (26), we can find a few festivals scheduling more than 100 concerts (*Kilkenny Arts Festival*, 170 concerts, Ireland)

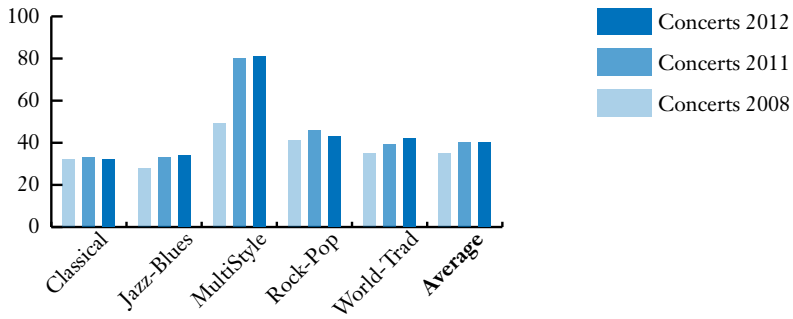
and others with less than 10 (*Terror Trumpet Festival* or *Cantate Barcelona*, Spain). In world/traditional music (a median of 26 concerts), we can equally find a few large programs (*Les Internationales de la Guitare*, France, 200 concerts; *Culturescapes* in Switzerland, 100 concerts) as well as far smaller ones like the *Willie Clancy Festival* in Ireland with 7 concerts. Generally, however, the median best describes the density of programming for this style of music. Jazz/blues follows with a median of 25 concerts (180 concerts at the *Gentse Feesten* in Flanders) and around 10 concerts at the *Tampere Jazz Happening* in Finland.

If the majority of concerts (55%) take place on a single site, 45% of the festivals schedule activities away from their principal site. The decentralization of activity is even an organizing principle for a certain number of festivals. This can especially be seen with classical music (59%) and jazz/blues (51%). It is a less common practice with multi-style (42%), world/traditional (39%), and rock/pop (26%).

Festival programming, which as we have seen is the product of many different influences, is also based on a repertoire alternating between safe choices and artistic risks. Among these, though very specific to specialized music, one can find festivals that contribute to the composition of new musical works by programming a national or world premiere. A world premier is more common than a national premiere. Here, budget size clearly makes a difference. The majority of premieres are offered by festivals with hefty budgets (exceeding 900,000€).

A rapid glance at change in the number of concerts (2008-2012) gives us an idea of festival dynamics. We have chosen to base our calculations on the 193 festivals that completed the questionnaire in its entirety.

Figure 41. Average number of concerts by musical genre (2008-2012)

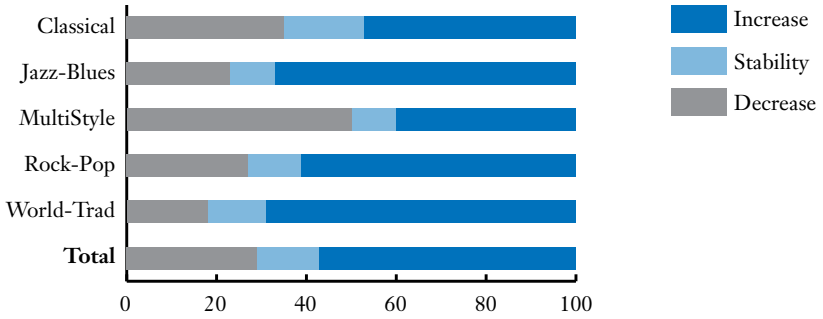


If we limit ourselves to the overall average, we can see a general increase between 2008 and 2012, going from 35 concerts in 2008 to 40 concerts in 2012. However, not every style has recorded this same movement: classical music, jazz/blues, and world/traditional show almost complete stability

(between 2011 and 2012 for the two latter styles), and it is in multi-style that we can see remarkable change over the course of the last year. A relative newcomer to the festival scene, this style attracts higher audiences and, as we have seen, increases significantly the number of concerts.

If we examine this same trend in terms of the number of festivals that increase, reduce, or maintain the number of concerts, we get a slightly different picture.

Figure 42. Change in the number of concerts by musical genre (2008-2012) (%)

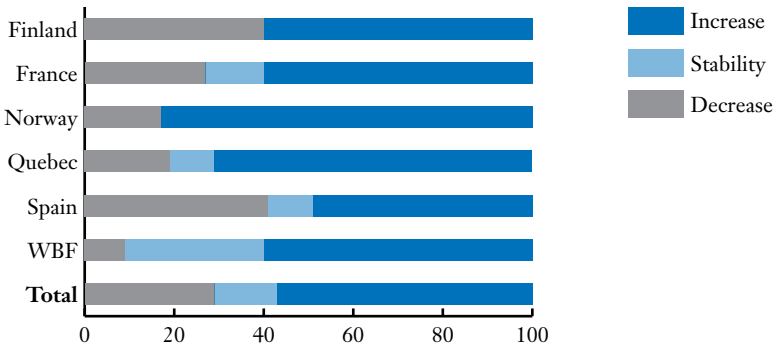


Out of all of the festivals studied here, 57% still show an increase in 2012 with respect to the number of their concerts in 2008, 29% show a decrease, and 14% are stable. However, this general average does hide some variation, mainly between multi-style music festivals (with more decreases and fewer increases) and the other genres. These mostly positive changes do not correspond to the changes we observed in the chapter on festival finances: 42% showing an increase, 44% a decrease, and 13% stability. We can thus suppose that a certain number of festivals have adopted strategies to circumvent their financial difficulties permitting them to increase their activity despite diminishing resources, perhaps by billing less expensive artists than they did in the past, for example. Consider the example of world/traditional music. We can see a high degree of consistency between the change in the number of concerts and in audience size. When the first indicator is growing, the audience size predictably follows. On the other hand, these two indicators are at times at variance with the budget size. Nine festivals in this group show decreased expenses – sometimes significantly so – between 2008 and 2012 while the number of concerts has increased over the same period. Inversely, two other festivals display budgetary growth accompanied by a decrease in the number of concerts and total audience size. If the majority of cases show these three indicators changing in almost identical ways, this does not prevent occasional discordant trends.

This data is not unaffected by the national variable. Thus, we can see trends common to Finland, France, Norway, and Quebec that are markedly upward,

with very few stable festivals. Spain manifests the opposite trend, with a high proportion of festivals showing decrease. Finally, there is the rather particular case of the Wallonia-Brussels Federation with a high number of stable festivals (31%) but few decreases.

Figure 43. Change in the number of concerts by country (2008-2012) (%)



Spain, where the economic crisis began earlier and has been more severe than elsewhere, presents us with a paradoxical situation. This indicates that festivals are extremely sensitive to the global situation and that they are subject to economic constraints. But equally the different impact of the recession can alert us to the way in which cultural and artistic sectors have responded to this new context. Some, either because of their strategies or political support, have remained relatively unscathed while others have been dramatically affected. Thus, the festivals that rely most on public funding have, with a few exceptions, suffered the most from the budgetary crisis facing local governments. Those festivals that rely on ticket sales, however, have shown more resilience, and these are usually to be found in contemporary forms of music.

This is a phenomenon to be found in many different countries where the crisis has seemed to spare festivals while, in the same artistic world, permanent venues have shown more slackening in their activities. This is the case in France, for example, with regard to current music. The crisis, then, does not have an especially unilateral impact on the activity of festival teams when compared with the cultural sector as a whole.

Number of artistic groups and artists billed in 2011

The number of groups signed on to participate in a festival, though closely related, is not necessarily identical to the number of concerts scheduled since one group can play several concerts in the same festival. Also taken into account can be groups or ensembles that do not necessarily play in a concert hall. Some festivals schedule fanfares or itinerant musical groups which move

throughout the site and are not necessarily counted in the number of concerts. In the figure below, by "number of artists," we mean all artists present, whether playing solo or in a group, and the "number of groups" corresponds to the number of ensembles which have been scheduled.

Figure 44. Average and median number of groups billed, by musical genre

Average (median)	Classical	Jazz & Blues	MultiStyle	Rock & Pop	World & Trad	Global
Number of groups	20 (11)	45 (26)	71 (26)	59 (34)	32 (26)	**38 (22)**
Number of artists	348 (168)	254 (130)	2,058 (600)	280 (140)	265 (150)	**380 (160)**

On average, a festival signs on 38 groups and 380 artists for a mean of 10 artists per group. The median is lower, just as we observed with the number of concerts, a difference that can be explained by the weight of a few very large festivals that significantly surpass these figures. As with other characteristics, there are large variations between the musical genres. It is the hybrid category of multi-style that displays the highest average in terms of groups and artists. The presence of two of Quebec's festivals explains these extremely high percentages: the *Mondial Loto-Québec* in Laval which brings together North American choruses and vocal ensembles and the *Festival des harmonies et orchestres symphoniques du Québec & Off festival*. Together, they total 28,500 artists, a figure which obviously increases both averages and medians. However, even when we remove these festivals from our calculations, we still have a median of 400 artists because of festivals like the *Musicoral* in Spain, bringing in 911 artists, and the *Helsinki Festival* (Finland) which rallies more than 1,000 artists with a program mixing classical concerts, rock, theatre, dance, and cinema over more than a two week period.

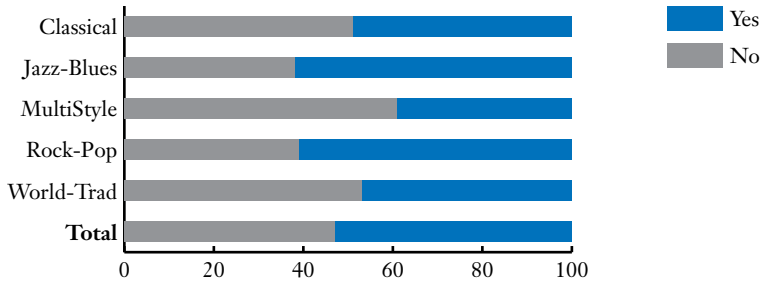
As with the number of concerts, it is rock/pop which displays the highest median for groups (34) with a median of 140 artists. This is consistent with the rapid succession of rock concerts and gives us an average of 4 to 5 artists per group. We can find once again a contrast with classical music since it has the lowest median (11) for groups but, as opposed to rock, has a higher number of artists (168), giving an average of 15 artists per ensemble.

In terms of medians, jazz/blues (26) and world/traditional (26) show the same number of groups but differ in the number of artists. The median of 130 artists for jazz/blues makes it the musical style with the least number of artists per group (5), while world/traditional has a median of 150, giving it 6 artists per group.

The extension of the festival domain: "off-season" activities

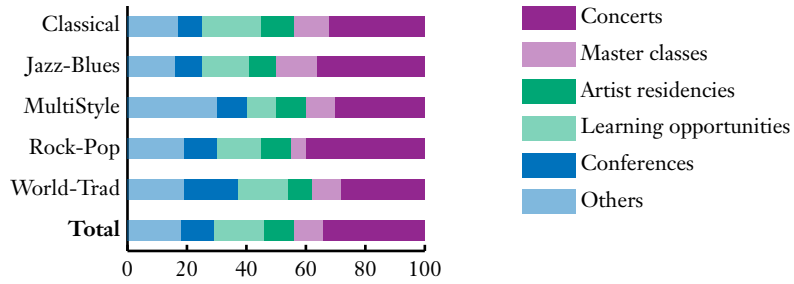
The life and activity of a festival are not limited to its concert list. Indeed, outside the dates of the festival season, the festival is more and more… present! "Off-season" activity concerns more than half of our sample (53%). Typically, the purpose of such activity is to maintain a connection with a festival's audience and the local population, to create links with local educational partners, to pursue objectives such as broadening the public's knowledge base or supporting musical composition and the training of musicians. More prosaically, this activity seeks to promote the festival brand over a longer period of time, thereby creating value. These parallel activities modify the image of a festival as confined to a time and a place uniquely dedicated to the diffusion of music. Through these initiatives, the festival is able to place its activities within another sphere, creating participatory moments both before and after its more public season.

Figure 45. Activities outside of the festival dates, by musical genre (%)



Musical genres vary in the degree to which they organize activities outside of the festival dates. Jazz/blues organizes the most activities (62%), followed by rock/pop (61%), classical (49%), world/traditional (47%), and multi-style (39%). This activity is comprised by the following elements: holding concerts (34%), offering learning opportunities (17%), holding conferences (11%) and master classes (10%), and sponsoring artist residencies (10%). The remaining 18% of "other activities" involves several types of initiatives, principally exhibitions, cultural projects, voyages, and competitions.

Figure 46. Types of off-season activities, by musical genre (%)



When relating these different activities to the musical genres, one can see that festivals do not put into place the same panoply of activities. For rock/pop and jazz/blues, concerts are clearly dominant (40%), a choice that is less frequent with classical music (32%). This activity can be interpreted as a desire to maintain a connection with audiences throughout the year with a view either to increasing their loyalty to the festival, to renewing or expanding its audience, or to showing consideration to local residents. For example, some rock/pop festivals (The *Dour*, WBF) organize free concerts during the year intended for their volunteers and the local residents, with proceeds going to charitable organizations.

Providing educational opportunities especially characterizes classical music (20%) and world/traditional (17%). Classical music is the style which co-operates the most with music schools during and outside the festival dates. For example, in Quebec, a festival brings together several thousand young musicians from conservatories and music schools, associating them with its activities. Artist residencies are less frequent and involve all musical styles, not just classical music, though this is the genre generally associated with it. Conference and world/music are closely related because of the style's cultural objectives. Their priority on intercultural dialogue and their stance against globalization leads many of these festivals to interact with their audiences to sensitize them to issues which are at the heart of their concerns. This interpretation is strengthened by the fact that many of the activities classified as "other" are in reality para- or extra-musical discussions.

Festivals with more than 10 seasons behind them are the ones that organize the largest number of these off-season activities. One might say that festivals must first walk before they can run. Indeed, for a number of festivals, this seems to be their age of maturity during which they evolve from an ephemeral structure solely designed for seasonal events to a permanent structure which prolongs its activity throughout the year. The size of the total budget also appears to be connected to planning off-season activities since they are first developed in large festivals. Festivals with budget in excess of 900,000€ have twice as much off-season activity as those with less than 80,000€ at their disposal.

* *
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This analysis of festival activities profoundly modifies the conventional view. It reveals a number of activities that sometimes stretch for many months before and after the peak season of the festival. Scheduling off-season concerts, arranging artist residencies, or creating partnerships with artistic,

educational, or charitable institutions require human and financial resources necessitating a more permanent festival structure, even if the festival team often calls upon a large number of volunteers who remain active throughout the year. The "ephemeral" character of a festival can indeed be called more and more into question, and the degree to which a festival is locally anchored is probably an indicator of its credibility with different types of partners as well as the respect its audience accords it. This is what we shall be studying in the following chapter.

Chapter 5.
Festival audiences:
issues, priorities, and accessibility

Though central to an analysis of cultural policies, the question of audiences, particularly festival audiences, has been comparatively little studied, though many countries have already set up cultural research institutions and national enquiries into their inhabitants' cultural practices. Academic work on this subject has also continued to increase since the festival model has emerged as a major means of artistic diffusion (cf. Négrier, Djakouane, Jourda 2010; Négrier, Djakouane, Colin 2012; Ethis 2001 & 2002). Analyzing the socio-economic background of festival audiences, these studies show that festivals are reaching new and wider audiences when compared with more traditional cultural institutions, though there are still problems of equal access to cultural events for all.

Questions related to audiences are a major preoccupation for festival organizers. In the present work, we have seen this manifested through many of a festival's objectives, notably a desire to widen cultural access to different social groups, to educate the public, or to promote intercultural dialogue. In some festivals, it has also manifested itself as a desire to connect with audiences through the Internet or via partnerships and cooperative ventures. The importance of audience loyalty and of attracting new and larger audiences, then, is clearly recognized by festival organizers, all the more so because of an economic context which is becoming increasingly competitive for festivals and critical for public bodies.

The data at our disposal remains general in nature and is mostly concerned with the role audiences play in determining a festival's priorities and shaping the issues with which it grapples: the age, the origins, and the number of audience members in attendance. If it does not allow us a qualitative view of the audience, it does allow us to question and verify in a large sample a few common notions about the characteristics of audiences.

Thus, we will attempt to see if certain musical styles or genres are more attuned than others to enlarging and widening their audience base. We are aware of the importance classical music attributes to attracting younger audience members, for example. We will equally see how budget structure intersects with audience-related issues. Indeed, we can suppose that festivals receiving less public funding will give more attention to audience size in terms of ticket sales and receipts. They will likewise be more sensitive to ticketing strategies and policies because of their need to balance their budget. On the other hand, festivals that are heavily subsidized will be more likely to think about increasing accessibility, even providing free tickets, because of the mission with which they have been entrusted.

We will also be able to check whether a few common views are indeed valid. For example, it is commonly believed that young audience members attend rock/pop concerts in vast numbers while neglecting other genres like classical music, which above all attract older audiences. Likewise, because of the cultural project of world/traditional concerts, these festivals are seen as more likely to bring together different generations or attract larger foreign audiences.

After we have studied the audience-related issues for festivals, we will analyze attendance figures as well as the origin and age of audience members and finish by looking at the ticketing policies festivals have developed.

Audience-related issues

Generally, festivals rely more than the other performing arts on income from ticketing. Furthermore, it is often suggested that the festival model creates a different relationship with an audience. For example, it is held that they attract wider audiences because of their more festive and less intimidating atmosphere and that festivals blur the distinction between leisure and cultural activities. The question of audience is very specific in the festival context, since there is a strategic element linked to the festival budget and a cultural element linked to the specific practices of audience members. It is noteworthy that, when we asked festivals which categories have experienced the most change over the last four years, two thirds affirm that attracting festival-goers is a major target. This is thus a key question, regardless of musical genre. However, not all festivals address these cultural and strategic elements in the same way nor do they propose the same solutions to current issues.

Our questionnaire presents a list of six elements which festivals were to rank by importance: increasing audience sizes, attracting new festival visitors, increasing public funding, developing more private partnerships, reducing expenses, and regulating competition between cultural providers. To gauge the relative importance of these elements, we asked festivals to assign each of them a score out of 20. The results we obtained show rather interesting points of convergence and divergence, particularly between musical genres.

We will begin with the points of convergence. It is evident that our rankings place the growth or preservation of financial support from public and private institutions as top priority. It has been supposed that the economic crisis has changed the role governmental support plays for festival organizers, and one would think that private partnerships would be considered as a more viable option. This point of view assumes that no one truly believes that the public funding of festivals can continue to grow, either in the short or medium term. Yet, festival organizers here remind us that, with a few exceptions, public

money is an integral condition of the life of a festival. The genre with the highest expectations for private partnerships is what we call multi-style. Often better funded than the average festival and using their programming to target audience that are, by definition, more diversified, these festivals doubtlessly find they are well placed for attracting patrons or sponsors who desire an ever stronger public image.

Figure 47. Ranking of festival priorities by musical genre (score/20)

	Classical	Jazz-Blues	Multi-Style	Rock-Pop	World-Trad	Average
Securing greater public funding	14	14	14	13	14	**14**
Developing more private partnerships	14	15	16	13	14	**14**
Attracting larger audiences	13	12	15	11	11	**12**
Attracting more diverse audiences	10	9	8	7	8	**8**
Reducing programming-related expenses	8	7	6	9	9	**8**
Decreasing competition with other cultural providers	2	3	5	6	4	**4**

We can also note that increasing audience size is a high priority for festivals. It is in third place for all genres. Here again, this is a demonstration of the strategic importance accorded to audience-based revenue, as opposed to the desire to reach different audience members from those traditionally attracted by a specific genre. Multi-style festivals as well as classical music and jazz/blues clearly correspond to this profile.

Other issues, however, expose the differences between musical genres. On the one hand, rock/pop and world/traditional festivals consider that reducing expenses is one of the keys for their future. This can be interpreted in two ways. First, there is the question of artistic costs, especially for festivals that must face the inflation of artists' fees – in particular, for headline acts that are difficult to replace with less expensive artists – without being able to take a collective stance or to benefit from regulation. The second is related to technical expenses, in particular for the two styles that use amplified music as well as a large range of stage and sound equipment.

Jazz and classical festivals place the question of attracting more diverse audiences in fourth place. This is logical for festivals having difficulty renewing

their audiences. Classical festivals identify this as a recurring problem, though some festivals do seem to remain unscathed (Négrier, Djakouane, Jourda 2010). Many studies on cultural practices nevertheless show an audience that is tending to grow older with time (Donnat 2009, Garon 2004, Guérin 2009).

World/traditional and rock/pop festivals are less affected by this qualitative issue, probably because of the highly diverse audiences drawn to these genres. Nevertheless, they do not neglect this issue and many try to avoid being too closely identified with only rock or pop through their programming strategies. Here, the desire to diversify a festival's artist list is mirrored by the desire to diversify its audience. Finally, there is one last issue dividing festivals: deciding upon rules to regulate competition within the festival industry. We will make two observations regarding this. First, it is considered as the least important issue. This leads us to believe that festivals, being hybrid entities that are mostly situated in a private framework but still close to public paradigms and funding, do not necessarily consider direct intervention in this sector to be legitimate. Regulating what festivals can offer their audiences is a relatively marginal question which festival programmers themselves have a great deal of difficulty resolving. It is not uncommon for festivals to try to push their way into territories or time periods that are already fairly well occupied by other festivals of the same profile. The negative effects of this growing competition between festivals is, however, sharply felt by the genres that are more subject to commercial demands because of their dependence on ticket sales: rock/pop and world/traditional music.

We can conclude that, although musical genres do display differences in the importance they accord to each priority, all festivals consider the question of audiences as a significant one. It is rather astonishing, then, to see how few studies have looked into this question: only 34% of the festivals in our sample have commissioned studies on their audiences. These are, in general, festivals that are newer and better funded than the average event. Of course, a good number of festivals gather information on their audiences during the festival itself, collecting data on audience feedback through the Internet while their on-line ticketing site provides them with demographic information (the gender, age, and origin of their participants). This only allows a partial understanding of their audiences, but it does represent an important contribution. There are national differences in the degree to which festivals collect information: Quebec (72%), Finland (65%), Sweden (52%), and France (49%) are the countries which possess the most studies on festival audiences. Here, we can see that an investment toward understanding audiences is not due to a single political tradition.

Festival admissions

The growth in the number of festivals and their geographical dispersion – whether they are urban or rural, incorporated into large cities or metropolitan

areas or distanced from them – has associated festival activities more closely with the lives of residents. Since a festival is anchored in its local context, is open in character, and often extends its activity to the off-season, both the duration and the event have progressively become more commonplace with less symbolic distance. In short, festivals have now become cultural events, fixtures of the local environment, whose festive atmosphere can attract very large audiences. Here, we will look at festival admissions in terms of audience size and composition. We will first determine if musical genre significantly affects the number of audience members. Then, we will address the question of differences with respect to musical style and nationality. Finally, we will analyze the change in this data since 2008, limiting ourselves to those festivals that furnished complete information on this subject. This will allow us to see to what degree the 2008-2009 economic crisis, having affected all industrial countries, has also affected festival attendance.

The large diversity of the festivals in our sample is again revealed in the data regarding attendance rates. The range is large, going from a few hundred audience members to more than a million. The figure below (audiences 2011) presents a classification system that illustrates this distribution.

Figure 48. Audience size by musical genre (%)

Number of admissions	Classic	Jazz-Blues	Multi-Style	Rock-Pop	World-Trad	Total
< 3,000	29	10	22	16	16	**20**
3,000-5,999	27	29	11	16	10	**21**
6,000-19,999	25	29	22	25	30	**27**
20,000-79,999	16	19	22	23	35	**22**
> 80,000	2	13	22	19	9	**10**
Total	**100**	**100**	**100**	**100**	**100**	**100**
Median	**5,050**	**7,818**	**17,547**	**10,379**	**15,000**	

Generally, festivals are distributed fairly equally among the different brackets except for the 6,000-20,000 category which represents 27% of festivals and the '80,000 or more' category which represents only 10% of the sample. More than two thirds of our festivals record less than 20,000 participants. This contrasts with the image of festivals as national or international events which the media often presents. It also illustrates the growth of medium-sized festivals with a local or regional character.

With musical genre, we can see important differences. Twenty-nine percent of classical music festivals have audiences of less than 3,000 (200 at the Kalvfestivalen in Sweden) as opposed to only 2% with more than 80,000

admissions. Of all the genres, classical music is the only one for which more than half the festival-goers attend festivals with less than 6,000 participants. We can add that these festivals are also those which last for the longest number of days and, for some, also take place on several different sites, as we will study in detail later. The median audience size for classical music festivals is 5,050 (2011 audience size), which makes this type of festival the most "intimate." Considering the artistic objectives which classical music festivals pursue, as opposed to those with amplified music, large concentrations of people are not appropriate for them. Without exception, classical music festivals privilege the acoustic quality of a musical performance by a careful choice of sites which can only accomodate smaller audiences.

Jazz/blues festivals are situated in the middle categories, with 29% of the festivals recording 3,000 to 6,000 admissions and another 29% counting between 6,000 and 20,000 audience members. In 2011, the median was 7,818, putting jazz/blues just ahead of classical music. Nevertheless, 13% of these festivals total over 80,000 admissions (250,000 for the *Brussels Jazz Marathon*), showing that this genre can also attract large crowds, while also perhaps privileging the decentralization of concerts.

It is unsurprising to find that 19% of rock/pop festivals have more than 80,000 participants (*Rototom Sunsplash European Reggae Festival*, Spain, 230,000 festival-goers) and that 16% have fewer than 3000 admissions. Rock/pop is thus consistent with its image as being large festive events anchored in the counter-cultural movements of the 1960s. However, these festivals are no longer only large national or international events. We can now find a fair number of smaller festivals with a local or regional flavor (40% with fewer than 6,000 participants). Of course, their objective is to continue to grow, but the heavy presence of these small festivals and the large variation of festival size inherent to the genre gives it a median audience size of 10,379, putting it in third place, ahead of classical and jazz/blues.

World/traditional music is different from the others in that 35% of its festivals attract between 20,000 and 80,000 festival-goers. This genre is thus in the top position in this category. In 2011 the median is 15,000 participants per festival. Though we can find a few festivals with more than 100,000 participants, this style is not always characterized by big crowds, even if its budget relies heavily on the festival revenues it generates.

With the highest median audience size, situated at 17,547, multi-style displays once again its heterogeneity. Both extremes are represented, with a few small festivals attracting less than 3,000 participants and also a few large festivals. They are either highly specific to a particular audience (*Harmoliège*,

harmonica festival, 600 participants) or extremely diverse in their program (*Festival de Carcassonne*, 200,000 participants). The latter festival mixes musical, esthetic, and artistic styles, at times including folk elements, in order to meet the large array of tastes characterizing its participants.

Thus, the largest median audience sizes are first found in multi-style festivals, followed by world/traditional music and then rock/pop. Yet, it is rock/pop which has a sizeable contingent of mega-events, with 19% of its festivals attracting more than 80,000 participants. The main lesson, though, is that each musical genre displays heterogeneity, with a few large events and the more frequent festivals of small or medium size. Fifty-seven percent of rock/pop festivals total fewer than 20,000 participants.

Is the national variable less important here? It is true that when we classify this data by country, we can see that more than half of the festivals in Sweden (74%), Wallonia-Brussels (56%), and Spain (52%) have fewer than 6,000 participants. Flanders and Quebec, on the other hand, have a high percentage of festivals with more than 80,000 participants. The other countries are in an intermediate position: audience size is distributed over all categories, though there are a higher percentage of festivals in the 6,000 – 20,000 range in Ireland and Norway. In Finland, we can find a greater concentration of festivals with between 20,000 and 80,000 participants. However, this does not lead us to conclude that the national framework has a strong influence. We can find similar contrasts when we examine budget sizes. Quebec's festivals are of a different order because of large crowds coming principally from Montreal and Quebec City. The distribution of festivals through the large and more economically challenged Spanish regions inevitably leads to smaller audience sizes. However, both large and small festivals coexist in each country, with both arena-sized concerts and more intimate venues. There is not a national tradition that leads to a particular audience size in a deterministic way.

For the more limited number of festivals and countries (6) for which we have 2012 data, we can find an overall average change in audience size of 16% for the period 2008-2011, with remarkable growth in Norway and Quebec. It is clear that the continuing effects of the 2008 crisis were yet to be felt by festivals in 2011, though they do affect many other cultural organizations that are directly hit by budget cuts in the public sector. The 2012 data, however, does show slackening attendance rates. With the exceptions of Norway, which displays a slowing level of growth, and Quebec, which apparently is not experiencing the crisis, we can see that the level of change has sharply declined everywhere else. Moreover, decreases in audience size that are sometimes very sharp bring the overall average growth in audience sizes down to only 1%.

Figure 49. Change in audience size by musical genre (2008-2012)

	Finland	France	Norway	Quebec	WBF	Spain	Overall
Average							
Audience 2008	29,489	21,092	24,354	37,782	24,994	12,713	**22,314**
Change 2008-2011	4%	8%	35%	38%	10%	7%	**16%**
Change 2011-2012	-7%	-7%	2%	33%	-19%	-9%	**1%**
Median							
Audience 2008	9,634	7,382	5,827	22,250	3,700	4,372	**6,500**
Change 2008-2011	55%	11%	34%	0%	23%	-2%	**15%**
Change 2011-2012	-18%	11%	28%	53%	10%	0%	**5%**

The average extent of change must be interpreted carefully. It is heavily influenced by a few "large numbers" that can give us the impression of a less powerful dynamic at play. When we look at the interaction of these changes with audience size, we can see that the largest and the smallest festivals show the greatest decreases. This explains why the median is stable or even showing an increase while the average audience size is decreasing in many countries. However, for a large number of festivals, audiences have indeed felt the effects of the crisis and a loss of their purchasing power. The fact that the median shows an increase in different degrees for each country clearly shows us that not all festivals have been affected in the same way. This is particularly true in the Wallonia-Brussels Federation, displaying a decrease in average audience size of 19% between 2011 and 2012 but showing an increase in the median. Fifty-four per cent of the festivals experienced a growth in their audience size during the 2008-2012 period, as opposed to 37% which show a decrease and 10% displaying stability. These changes cannot always be related to changes in budget size or activity. Indeed, over the same period, we know that, where the average number of concerts is stable, we can see a slight increase in the median, just as we have seen with budget sizes. Thus, the increase in the cultural supply does not necessarily entail an increase in demand with regard to audience sizes. These contrasting changes are part of festival dynamics. They show their sensitivity to larger global contexts as well as to audiences with a growing degree of mobility. Some of the decreases in audience size are thus less due to the effect of the crisis on consumer spending than to audiences being siphoned off by other cultural events. Spain, for example, has been hit the hardest by the economic recession, and its overall

audience size has been decreasing for a longer period of time than other countries. Yet Spain is also a country in which new festivals are created each week.

The origins of audience members

Once considered as exceptions, big "national" festivals attracted geographically diverse audiences that wanted to take advantage of this opportunity to hear artists, orchestras, and ensembles often of international repute. For these artists, there were fewer occasions for performing live than there are today because of issues of mobility, expenses, and fewer venues. Classical music paved the way, and the large rock/pop rallies which followed were always exceptional in nature, attracting audience members of many regions, often from regions a great distance from the festival. The exceptional character and the comparative rarity of these events necessarily made them highly selective in terms of audience since participants had to possess sufficient financial means to be able to attend the festival.

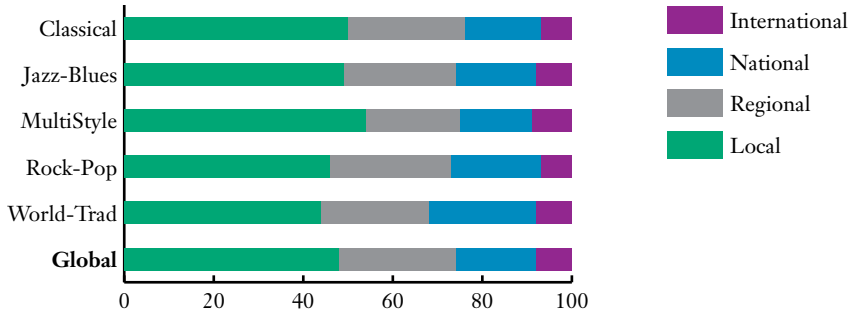
This era has now been definitively relegated to the past, and the explosion of local and regional festivals gives the opportunity to practically everyone in Europe to attend a festival close to home. Moreover, the type of programming has also changed. In the chapter on cultural projects, we saw that the majority of artists are local or regional. We also know that the supply of artists is growing ever larger. We can thus suppose that the promotion of local or regional artists, which in some countries has also become a criterion for allotting public funds, has the effect of drawing in local and regional audiences who want to support "their" artists.

We are thus unsurprised to find that festival audiences are mostly drawn from the locality or neighboring areas. They make up on average 48% of the participants for all musical genres. The attention festivals give to their territory as well as the local inhabitants and audience members is fully justified. The number of other participants naturally tapers off in accordance with their geographical distance from the festival, though a few variations can be seen in smaller countries offering greater internal mobility or in trans-border festivals. Regional festival-goers represent a quarter of the audience (26%). Participants from elsewhere in the country represent 19%, while non-national participants represent 8%.

Few major differences can be observed between musical styles, with the bulk of the audience (74%) coming from the locality or the region. This figure is remarkable in and of itself. It shows that the regionalization of the program is consistent with a certain degree of regionalization of audience behavior. Here, multi-style festivals attract the largest percentage of local audience members.

With their mixed programs, they are doubtlessly able to attract a more diverse local audience. But classical music festivals are not left behind, since half of their audience is also local. These are also the festivals that propose the most "local" initiatives (educative activities, off-season concerts, etc.). In the end, one must look to world/traditional festivals to see a minor difference, with a slightly higher presence of national (24%) and international (9%) participants. But the small size of these differences, including for this musical genre which is supposed to attract audiences regardless of geographical location, shows the point at which festivals have become regional affairs.

Figure 50. Geographical origin of audience members by musical genre (%)



If we group together local and regional audience members, we can see that the pattern of distribution of audience by countries is not significantly different from that which we have observed for musical styles. More than two-thirds of French, Norwegian, Spanish, Swiss, and Quebecois audiences are local or regional. In Quebec, the terms "local" and "regional" apply to the whole of the province, giving a very high cumulative percentage (90%) for these two categories. Because of their smaller size and greater internal mobility, Flanders and the WBF attract a slightly higher percentage of national audience members than the average of 19%. Sweden (26%) and especially Finland (42%) differ from other countries because of the large presence of national audience members. However, these are countries for which regional identity and even the very notion of region remain mostly artificial concepts. Beyond the county scale, the audience becomes national, a situation that does not obtain for the other countries.

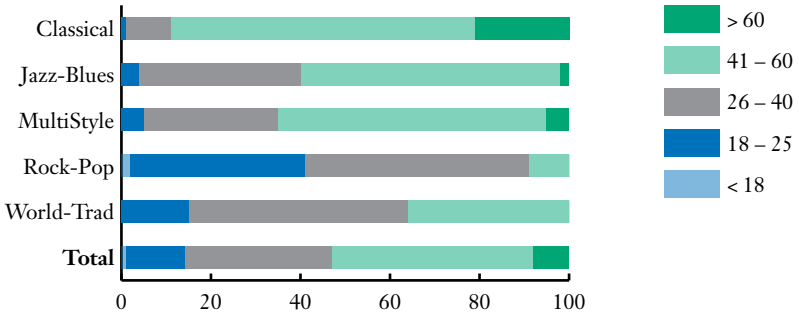
The age of audience members

Work on audiences for cultural events (Donnat 2009; Ariño 2010; Caillier, Hanquinet, Guérin, Genard 2012) shows that the age of individual festival-goers and their education levels have become two of the most important variables when studying cultural consumption. They do not entirely displace the question of social class, which remains very important, but age is the

factor that displays the largest differences between cultural practices. We will see what variation can be found in the age of festival audience members, especially given our received notions that classical music attracts older individuals whereas rock/pop draws in younger participants. The reality is doubtlessly less simplistic, and this analysis will allow us to measure the intergenerational character of festivals. In any event, audience age is also strategically important information for festivals that must not only attract audiences but also earn their loyalty and broaden their audience base. Earlier, we saw that this preoccupation is very important for festival organizers. We are basing our data on information festivals chose to communicate with us, and it must be interpreted cautiously, especially when we compare it with surveys that have been conducted specifically on this question of festival audiences (Négrier, Djakouane and Jourda 2010). To determine audience age, participating festivals had to provide two pieces of information: an estimation of the average age of the dominant type of audience member and the average age for the secondary type. Here, we will be analyzing the dominant type of audience member.

When observing the global averages for all festivals, we can see that the 41-60 year old age group is the largest (45%), followed by the 26-40 age group, representing 33%. The categories with the least festival presence are those under 18 or those older than 60.

Figure 51. Dominant age of audience members by musical genre (%)



Globally, the distribution of audience members is strongly affected by musical genre. Thus, classical music reinforces the dominant average age by attracting 68% of its audience from the 41-60 year old age group. It draws in another 21% from those over 60 years of age, a category for which the overall average is one of the smallest. Only a small part of its audience lies in the youngest categories (10% at 26-40), and a tiny fraction at 18-25 (1%). Indeed, it is quite surprising that a classical music festival would consider its dominant audience to be between 18 and 25 years of age. Where this occurs, it is with events that target the young, notably through providing educational opportunities. As

expected, then, classical music is the genre with the oldest average audience. This genre of festival is marked by a general trend that also affects classical music as a whole. Festival organizers are well aware of this characteristic since it could, in the long term, threaten their ability to attract audience members from the younger generations. This will also allow us to explain some of the strategies classical music festivals implement, particularly in terms of ticketing policies, as we will see later.

At the other extreme, the bulk of rock/pop concerts' audiences are under 40: half are between 26 and 40 years old, with four festival-goers out of ten being between 18 and 25 years of age. This represents a large departure from the average. Indeed, this is the only genre for which some festivals attract a majority of young participants aged under 18 years and which do not identify a dominant age group over 60. The cleavage between classical music and rock/pop is flagrant.

Jazz/blues and multi-style are situated in the middle, drawing the majority of their audience members from the 41-60 year old age group. The second largest age group is in the 26-40 year old range, though jazz tends to attract a higher number from this category (36%). For these two genres, we can again see a smaller number of audience members in the 18-25 category or over 60 years of age. These two categories bring together the intermediate generations that make up nine-tenths of their audiences. This is probably because jazz/blues and multi-style festivals have some commonalities: they demand a certain level of sophistication and popularity, and they borrow from many different musical registers.

World/traditional music presents us with a unique situation since its audience members are distributed among three different age groups, the most important being the 26-40 group (49%), followed by the 41-60 (36%), and then the 18-25 (15%). As we hypothesized, this style appears to be the most intergenerational in character, with stronger presence of younger audience members than in other styles, excepting rock/pop. This audience structure reflects the objectives and cultural projects of these festivals, as they attempt to create a framework encouraging dialogue between audience members.

Analysis by country gives us a distribution that is roughly comparable to what we have previously seen, though we can observe a few variations due to the composition of our sample. France and Sweden show the largest variations with a higher-than-average presence of audience members over 60. In the Wallonia-Brussels Federation, on the contrary, younger audience members are more represented.

Ticketing policies and free admission

Questions of festival ticketing and free admission involve several different elements, the first being economic in nature. The chapter discussing festival financing shows the crucial importance ticketing can have for festivals. It is also a strategic variable for an organizer whose potential audience has a choice between several different festivals. The price must remain attractive and correspond to the artist list, even if many researchers have shown that the value consumers assign to a festival offering depends on several social and psychological factors (Throsby, 2003). In fact, we can find many combinations of ticketing policies, which we have attempted to classify. Indeed, festivals develop ticketing policies ranging from tickets for individual concerts to day passes and festival passes giving entry to all concerts. To this, we can add special pricing for certain audience categories (students, the unemployed, retirees, etc.). These policies vary according to the festival. For example, classical music festivals privilege single concert tickets more than do other genres, while rock tends to privilege day passes or festival passes.

Free admission also features in these policies. Some festivals give free admission for some events, others for the totality. This cannot be understood without looking at how a festival is funded and the objectives the organizers pursue. It is connected with making cultural events more broadly accessible, though the degree to which this is the case is debatable. Free admissions applies in cases where festivals are heavily funded by governments seeking to "offer" their citizens cultural events without admission barriers. The practice of providing completely free concerts, which is now becoming rare, is paradoxically comparable to the marketing strategies of sponsors who pay for the publicity in its entirety, though this is more often found in music tours than in festivals. Another more selective practice is to reserve free admissions for certain concerts (the most "difficult" music, rising artists, opening concerts, etc.) in order to popularize a music style – a contemporary composition, for example – or the festival itself.

Roughly speaking, long-standing debates over free admissions are held between those who consider it an ideal which festivals should strive to reach and those for whom it carries a cost and symbolically devalues a work of art or a performance. In the following analysis, we will present the broad characteristics of these ticketing policies by musical genre as well as indicating the festivals which provide free admissions.

In order to define the ticketing policies used by festivals, we asked for the set ticket price when it was available and, in the case where different prices were being offered, the maximum, minimum, and average price as well as the price for a pass. A small number of festivals offer a fixed price to their audiences

(12%). The average price is 26€, though it varies according to the musical style: for classical music, the average is 10€ while the average for rock/pop is 41€.

Figure 52. Average price (€) by musical genre

Average	Classic	Jazz-Blues	Multi-Style	Rock-Pop	World-Trad	Overall (Median)
Maximum price	43	47	**61**	59	38	**47 (35)**
Minimum price	10	10	11	**21**	12	**13 (10)**
Average price	23	20	**33**	28	20	**24 (20)**
Price of a pass	34	39	27	**44**	36	**38 (27)**

The highest average prices are to be found with multi-style (61€) and pop/rock (59€), figures that deviate considerably from the general average of 47€. However, these high figures should be handled with caution. They can be understood in two different ways.

The first is related to the greater budgetary importance these genres accord to ticketing than is the case for classical music festivals. The higher expenses which rock/pop festivals must bear, especially in terms of equipment and artistic fees, and the lower rate of public funding can explain the higher ticket prices. Inversely, the lowest ticket prices can be found in classical music and jazz/blues (10€). These festivals, receiving more public funds, can more easily put into place special admissions policies, as we shall see later.

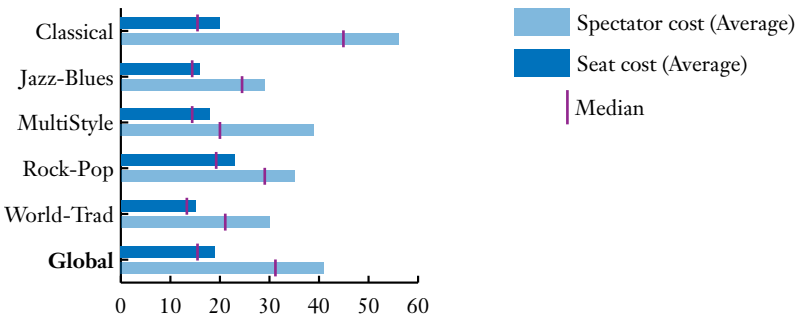
In world/traditional music, prices are systematically below general averages. Here again, we can suppose that this ticketing policy is related to rendering festivals more accessible to different categories of audiences which have a stronger intergenerational character than in other genres.

The price for a pass, either for a day or for several concerts (43% of the festivals responded on this point) is situated at a global average of 38€. Its price is higher in rock/pop, though the average of 44€ for this genre is often greatly exceeded – even doubled or trebled – especially for large music events such as the *Primavera Sound System* in Barcelona, the *Paléofestival* in Nyon, or the *Eurockéennes* in Belfort.

This rapid glance at ticketing gives us a picture of how prices can vary for audience members. However, it is difficult to reach general conclusions about questions of accessibility or about the relationship between festival budgets and their audiences. Indeed, these differences in admissions policies make it easy to form erroneous interpretations. Take the example of the price difference (of 50%) between rock and classical music. For a larger number of rock festivals, a ticket allows admission to several concerts whereas tickets are

more commonly for a single concert in the case of classical music. The comparison thus becomes artificial when the price does not correspond to the same "product": a single concert in one case, a series of sets in the other; two hours of music in the first case, up to ten hours in the other. To have a clearer image of admissions costs and a festival's relationship with its audience, we have decided to use another method of comparison which is, in our opinion, more reliable. Here, we will be using two variables. The first is the cost per seat and the second the cost per audience member (spectator cost). The seat cost results from the ratio of total ticket sales to the number of tickets sold. It does not take into account free admissions and expresses the average price paid per ticket. The spectator cost is the result of the ratio between the total expenditures of a festival and the total number of admissions, whether free or not. It thus indicates what each audience member "cost" a festival.

Figure 53. Seat cost and spectator cost by music style (€)



With this method, we can see that differences between festival genres are much smaller than in the previous figure. In terms of seat cost, rock/pop festivals display higher figures than classical music, but the discrepancy is now only 15%. World/traditional and jazz/blues festivals show themselves to be the most accessible in their ticketing policies.

As for spectator costs, which includes free admissions, we can see a different picture. Here, classical music is clearly in the lead, followed by multi-style festivals. This can be explained by the fact that, on the one hand, classical music festivals give fewer free admissions and generally have smaller audiences. Their budgets, though fairly small, are maintained with fewer audience members. Inversely, rock festivals, even with budgets in excess of a million euros, depend on a large number of audience members. Each individual participant, then, has less weight on the scales.

It is through using these two indicators, rather than limiting ourselves to the advertised price, that we can understand the relationship between festivals and

their audiences in terms of accessibility. However, it remains to be seen how festivals take into account the identity, especially in terms of social class, of their audiences in order to propose special prices.

Figure 54. Ticketing policies by musical genre

Ticketing policy	Classical	Jazz-Blues	Multi-Style	Rock-Pop	World-Trad	Overall
Student price	**80**	**82**	53	33	61	**65**
Price for the unemployed	**47**	**54**	36	19	43	**39**
Price for retirees	**41**	32	**43**	17	26	**31**
Other special prices	64	56	45	61	58	**61**
Special promotions	**60**	47	47	36	46	**49**
Passes	53	**66**	29	**67**	50	**56**
Group passes	40	48	**50**	47	44	**44**
Early-bird promotions	20	33	21	**56**	33	**34**

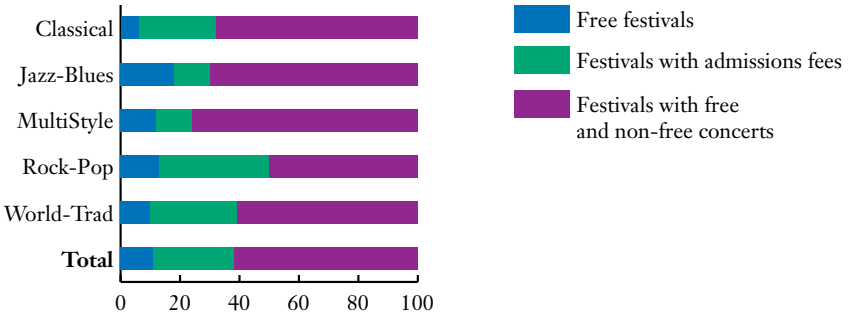
Special prices exist in all musical genres. They are linked to the social identity of their audience members or their buying behavior. It is interesting to note that classical music and jazz/blues are situated above the general average in terms of special pricing, in particular for younger audience members. Though they advertise average prices that are lower than in rock/pop (price for several concerts), classical music and jazz/blues make greater efforts to reduce the financial obstacle that tickets might create for some of their audience members. For these genres, this goes alongside other strategies (communication, marketing, program development) which express their concern with increasing and broadening their audience base.

Inversely, rock/pop festivals have far fewer special prices for certain social groups, even though their tickets cost more than they do in other festivals. Here, it is more a question of consumers' purchasing habits: promotional offers for early ticket reservations, or reductions for passes to several concerts or for several festival days. With essentially young audience members in attendance, these festivals do not have the same reasons for providing preferential prices.

In terms of free admissions, the majority of festivals use a mixed model (26%), offering a certain number of free concerts though admission to the festival

itself must be paid for. This strategy can be understood as a means of attracting new audience members or of "thanking" their habitual audiences. It is most used in multi-style festivals (76%) which, as we have seen, bring together a diverse audience with varied tastes, in jazz/blues (70%), and in classical music (68%). We can suppose that, for the last two styles, this represents a desire to attract new audience members. For reasons suggested earlier, rock/pop uses this policy somewhat moderately (50%).

Figure 55. Free admissions by musical genre (%)



Free festivals only represent 11% of the total. They are represented in all genres, more frequently in jazz/blues and less so in classical music. One might be surprised by the low rate of free festivals in classical music. Indeed, since these festivals are more heavily subsidized, with higher billing fees but lower technical costs, free admissions could be seen as a strategy for attracting new and larger audiences. This interpretation, however, ignores the values that are inherent to classical music, particularly in terms of how an audience perceives a musical composition. More so than with other festivals, free admission is perceived in classical music as a threat to the artistic and cultural value of a work. Here, the idea that an artistic performance should be remunerated is dominant, even if the financial contribution is merely symbolic in nature. We have also seen the classical music festivals advertise the lowest price and that they offer the widest range of special ticket prices. Thus, they have developed a policy of accessibility rather than a policy of free admissions. At the same time, this picture which obtains for almost the entire classical music sector is also dominant elsewhere.

Festivals with no free admissions constitute on average 27% of all festivals, and, unsurprisingly, rock/pop displays the highest percentage here (37%). World/traditional music (29%) is slightly above the average, but we have also seen that this genre is systematically situated below the average price for admissions. For all the parameters we have examined (price, ticketing policies, free admissions), this genre is the closest to the general averages.

When we look at the distribution by country, we can see that Flanders, Quebec, and Spain have the greatest number of free festivals. Festivals with no free admissions, on the other hand, one finds in the highest proportion are the most present in Sweden and the Wallonia-Brussels Federation. The mixed model of festivals obtains for all of Norway (100%). The qualitative country-by-country approach which follows will furnish other explanatory indications, especially in terms of public policies.

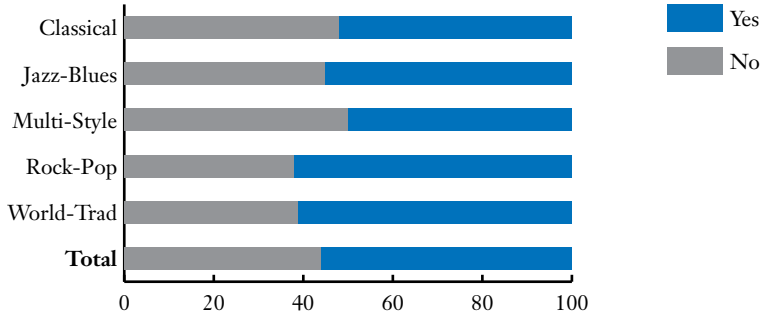
Though with distinct differences, all festivals lend a great deal of importance to the question of audience. Festivals develop specific strategies according to the amount of public funding they receive and the nature of the musical composition being performed. Because of the macro-economic situation which puts pressure on public funds and because of social and cultural issues, it is likely that free admissions will become increasingly rare. There are specific circumstances, perhaps connected to sponsorship, or, as is the case for Montpellier where its classical music festival is entirely paid for by a public radio station, when free admissions are considered as a secondary tool. In terms of rendering cultural events more accessible, this only addresses the monetary dimension of a cultural performance but it also brings into play very complex social and symbolic barriers.

Chapter 6.
Artistic Cooperation and Territorial Partnership

Cooperation is often considered to be an essential dimension in the world of cultural projects. Whether we are concerned with governmental issues stemming from the different administrative strata of the collectivities, with public-private relationships, or with the involvement of non-profit organizations in public policy decisions, our discourse is very often couched in terms of cooperation. This, however, is not always the case for festivals. Indeed, festivals have long been considered as exceptions in the field of cultural cooperation, and this for two reasons. First, festivals are often characterized by their temporary nature and are thus not in a dynamic that facilitates cooperative ventures within a local space which they inhabit for only a limited period of time. Second, festivals are often seen as being intimately connected to the personalities of their directors, and these directors are not often prone to cooperation amongst themselves for fear of losing their artistic and organizational independence. Today, this image of festivals is outdated. Cooperation between festivals and their social and cultural agents is now almost the norm (56%). Nonetheless, we will see that this cooperative spirit has not been developed in the same way when we compare festivals according to musical genres or the types of collaborative partnerships (with other festivals or local agents, for example).

Cooperation between festivals: from a project to a federation

Figure 56. Cooperation between festival/music style (%)



Cooperation between festivals characterizes the majority of these events regardless of musical style. Yet, some genres such as rock or world music appear to be more cooperative than classical music festivals. This tendency can first be related to the age of the festival, producing what might appear to be a paradoxical result. Indeed, one could easily imagine that the oldest festivals would have the most experience in cooperative projects, having been

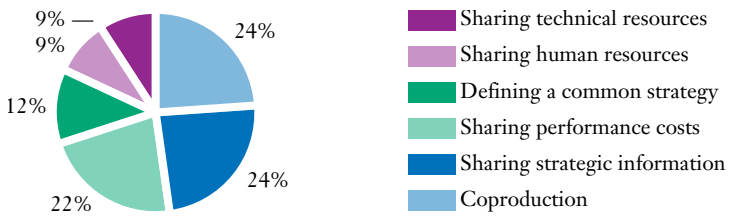
firmly implanted in networks of exchanges or of mutual help. This is not at all the case. Festivals that are less than 20 years old are, in general, more cooperative than their older counterparts. It would seem that older festivals remain marked by that singular character which was impressed upon them when they were founded. They tend to develop the considerable social renown they already possess via social and cultural partnerships rather than with another festival. Newer festivals, on the other hand, are more closely linked to an artistic milieu in which festivals are more frequent and more conscious of a common identity. But there are also, as we can see in the above figure, dynamics which are specific to certain musical genres as well as to sub-genres within rock/pop or world music. Their directors are not only younger than other directors; they work within an environment that is constrained by commercial and retail interests. They are also more likely to consider that the nexus of supply and the growing costs of artistic production will become the key issue in the future of festivals. The apparent paradox is that cooperation between festivals is stronger when the competition between them is more powerful. Competition and cooperation are thus not in opposition but complementary phenomena in an environment that, as we have seen, receives less public funding, is more subject to market forces, and is one in which artistic risks are intrinsically linked to commercial risks. Cooperation can thus be seen as a means of regulating what would otherwise be rampant competition.

Of course, cooperation is also a question of financial means. The average budget for the group of festivals which cooperate is more than 1 million euros, as opposed to less than 500,000 euros for those that do not cooperate. Festivals with significant budgets are also those that are in a position to organize cooperative ventures with other events, at the very least because they possess a staff specialized in this sector of activity. But the financial aspect can be misleading for two reasons. On the one hand, large festivals are often dedicated to contemporary musical genres, and thus the style of music is a determining factor. On the other hand, some festivals with smaller budgets (between 200,000 and 400,000 euros) are characterized by a higher rate of cooperate practices. In the latter case, the variables of musical genre and a festival's age become highly significant. To confirm this, we asked festival staff what has changed in terms of cooperation in the recent past. 62% of rock and pop festivals have observed an increase in cooperation, while only 4% have noticed a drop. World and traditional music festivals display the same pattern, though with less intensity. For classical music festivals, stability is a key indicator with 45% showing an increase and 3% a drop.

Though a growing phenomenon, aligned along the axes of budget and musical style, cooperation is not practiced in the same way – both in terms of frequency and intensity – with respect to the domain we are concerned with.

There are six different ways for festivals to cooperate: co-production of a work, sharing the performance costs of a work, sharing human resources, sharing technical resources, the exchange of strategic information, or the elaboration of a common strategy. The following figure displays the totality of 626 cooperative acts in terms of these different cooperative domains.

Figure 57. Cooperation domains

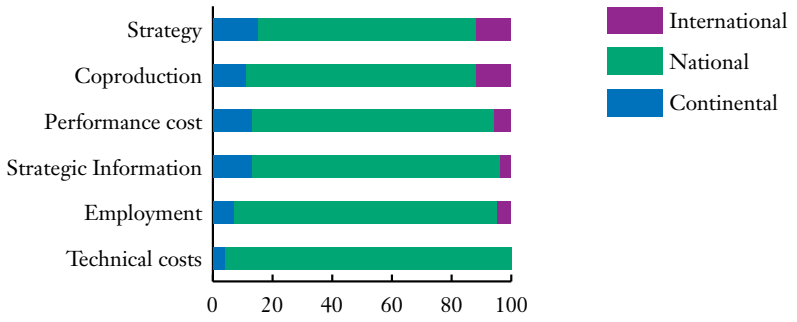


One can notice that the most frequent domains of cooperation are rather different in nature. The co-production of a work and an agreement to share the performance costs occur sporadically and for practical reasons. The partners choose a particular exchange on which to collaborate while retaining their own autonomy. The third among the most frequent domains (cited by 24% of the responses) is the sharing of strategic information. This concerns notably the thematic and national associations of festivals in which festival organizers can access data (via studies or statistics) about operational structures or trends broadly affecting the economy of the sector or concerning public policies. We will return to this issue later. The distinguishing feature of these three most frequently mentioned modes of cooperation is that they represent only a limited obligation for the festival, either in terms of time (especially for performances or productions) or in terms of operational activity (the exchange of information). On the other hand, these are the three domains in which smaller festivals would be the most involved. Human or technical resource sharing presupposes a high degree of synergy between different events as well as an excellent coordination of operations, both of which are quite rare. Sharing a common strategy represents a high level of commitment for a festival as it can determine a good number of the most important choices for a cultural event. Herein lies the limit for the cooperative capacity of a festival. Take as an example the different strategies involved in elaborating a program for rock and pop festivals. For the last few years, the trend has been marked by the inflation of the artistic costs of headliner events for a growing number of festivals and by stiffer competition. The association *De Concert* was created in Europe in order to confront the most frequent issues in contemporary music and specifically to take a stance on the risks of the increasing commercialization of the industry. Through this association, festivals can exchange information, and develop a stock of

knowledge allowing them to co-produce a work or coordinate a performance. One can easily imagine them investing in the areas which are the most crucial for them: the inflation of already high artistic fees. One can also imagine that they are trying to constitute an arena in which they can collectively negotiate the fees of big-name artists in order to turn the tables on their promoters and producers. But, according to the festival organizers themselves, such an arena would be too constraining for festivals which remain independent entities, even if there is cooperation among them. The paradox facing festivals is that they are cooperative "free riders": cooperative, yes, but "free riders" nevertheless.

In every country studied, the trend has been toward cooperation between festival organizers within the same country. More than 80% of those surveyed limit themselves to national partnerships. The elaboration of a common strategy, a rather rare mode of cooperation, is more international than other collaborative techniques. Co-productions are equally more open to international partnerships than other forms of cooperation. From this standpoint, we can observe that there is no real variation according to country or musical style.

Figure 58. Spaces and domains of cooperation (%)



* continental = Europe, or North America for Quebec

The participation in festival federations and associations is a dominant practice for festivals. Only one-third of the festivals studied are not a member of a federation. Another third participate in only one association, often a national and non-thematically limited federation. Here we can cite as examples *Festivals et Événements du Québec*, *France Festivals*, or *Festival de Wallonie*. Often, these associations are not truly general in their thematic approach but have a dominant musical genre. Such is the case for *Festclásica* in Spain or *Svenska Musikfestivaler* in Sweden.

Figure 59. Festival Associations Membership

	Festivals	Number of memberships				Total	Average per festival
		No	One	Two	Three		
Finland	20	2	6	9	3	**33**	**1.7**
Flanders	18	1	12	4	1	**23**	**1.3**
France	92	16	47	20	9	**114**	**1.2**
Ireland	21	4	14	3	0	**20**	**1.0**
Norway	10	0	1	6	3	**22**	**2.2**
Quebec	43	12	7	10	14	**69**	**1.6**
Spain	97	59	25	7	6	**57**	**0.6**
Sweden	23	6	6	8	3	**31**	**1.3**
Switzerland	7	1	2	4	0	**10**	**1.4**
FWB	52	33	16	3	0	**22**	**0.4**
Others	7	0	3	4	0	**11**	**1.6**
Total	**390**	**134**	**139**	**78**	**39**		
Total memberships	**412**						**1.1**

For festivals that have memberships in one or two additional federations, we can notice a much more themed approach, as is the case for the *Réseau Européen des Musiques Anciennes* (REMA), or an international approach, as with the *European Festivals Association* or the *European Forum of Worldwide Festivals*. One also finds festivals that form partnerships for specific causes, as with Spain's *Asociación Profesional de Festivales por la Diversidad* or Europe's *De Concert!* promoting European rock music. On balance, the countries where festivals possess the greatest financial resources (Quebec, Norway, Finland, or Switzerland) have the most robust participation in festival associations.

An examination of the differences between musical styles does not reveal anything substantive in terms of cooperation. The most cooperative genres are to be found in jazz and blues festivals, unlike rock and pop where 45% of the festivals do not participate in federations.

For rock, there is the cumulative effect of three factors. The first is institutional in character: federations are both more firmly established and more frequent in traditional music, world music, jazz, or classical music because they are also in closer contact with public institutions which, in turn, tend to offer more support. The second explanation is linked to the age of the festivals. To be a member of a group of festivals, it is often necessary to have had a stable artistic or cultural program for a fairly long period of time. Rock festivals, being the youngest in the sample, tend to form associations less often. Nevertheless, forming federations has become, even for them, a growing

phenomenon. Finally, those festivals employing few cooperative practices during their seasons often head the list of festivals cooperating during the off-season. Doubtlessly, this is a sign of a more sporadic cooperative strategy, closer to that of an informal club than to a formalized federation.

Figure 60. Extent of participation in festival associations by style of music

Membership numbers	None	One	Two	Three	Total	Average per festival
Classical	35	62	33	11	**141**	**1.1**
Jazz & Blues	20	11	15	7	**53**	**1.2**
Rock & Pop	46	32	19	7	**104**	**0.9**
World & Traditional	25	30	6	11	**72**	**1.0**
Multi-style	8	6	3	3	**20**	**1.0**
Total	**134**	**141**	**76**	**39**	**390**	

The association of festivals within a particular region remains very rare. There are only 28 within the sample. This might be seen as surprising in that, in almost all of the surveyed areas, governmental support for festivals is primarily extended through local and regional powers. Yet precisely because of this feature, regional authorities are perhaps too close to festival organizers to encourage collaboration between festivals. Thus, within their geographical areas, festivals can be seen more as competitors than as partners in the same project.

Territorial partnerships

Even though festivals only rarely collaborate on the regional scale, they do search for partnerships with local social, cultural, or educational agencies. We surveyed festivals to determine whether they have cooperated with five major categories of local bodies: music venues, music schools, educational institutions, civic organizations, and cultural institutions. The results are positive overall but inconsistent with regard to different styles of music. Some of the inconsistencies are somewhat surprising.

Figure 61. Cooperation between festivals and local organizations (%)

	Classical	Jazz-Blues	Multi-Style	Rock-Pop	World-Trad	Total
Cultural institution	57	55	56	**62**	60	**58**
Performance Venue	50	**64**	61	51	49	**52**
Educational Institution	**54**	49	**61**	31	41	**45**
Music Schools	**54**	**57**	50	16	31	**40**
Civic organization	31	30	22	**37**	29	**32**

The extent of territorial cooperation belies the frequent portrayal of festivals as not being deeply rooted in their localities, as opposed to more permanent organizations. The rate at which festivals create links with local civic organizations as well as educational and cultural institutions provides a demonstration of this: the majority of festivals have become local actors in their own specific ways. But each musical style has its own dominant trends. Thus, classical music festivals tend to create links with educational institutions and music schools. This is to be expected, since the latter are still often dominated by the study of classical music with a lesser focus on jazz. From the point of view of festival organizers, these institutions often represent their future audiences or an indispensable partner in the local organization of their festival. From this standpoint, rock music displays the opposite trend: these frequently turn to civic organizations, especially health or social sector providers. They can also be found working in partnership with cultural institutions. World and traditional music festivals are situated in the middle ground for all the factors, whereas for multi-style events it is with educational institutions that they cooperate most. It is unsurprising that professionals working within cultural institutions – especially those concerned with live performances – are generally the most attracted by the idea of collaboration. This is easily understandable in a situation when there is an exchange network in which spaces, equipment, and permanent partners can be offered to festivals. However, cooperation is a much more delicate strategy when we look at music school facilities. Here, many examples can be found which testify to the paradoxical difficulty in recruiting music students and especially their teachers to participate in the organization of a festival. This is perhaps due to rivalry with local bodies or other artists, among other factors. These are the substantive constraints which create obstacles for cooperation between festivals and their most 'natural' allies. As for social sector providers, they are only rarely invited to collaborate with festivals. Where the social sector is involved, it is to attract a different or larger audience or to democratize the festival.

Finally, if we combine all the possible cooperative strategies used by festivals (amongst themselves or with local bodies), we can notice that the average rate of cooperation is fairly similar across musical styles. Jazz and classical music have the highest rate of cooperation because of government involvement, local participative strategies, and the age of the festival. Other styles of music, though showing a lesser degree of cooperation, nevertheless display the same trends. The model of the individual festival which remains unconnected to its local milieu has not entirely disappeared but no longer dominates the festival landscape.

When festivals are asked whether the rate of cooperation is stable, growing, or declining, both stability and growth are given equal weight. 'Declining',

on the other hand, almost never characterizes the cooperative strategies of festivals.

Figure 62. Average number of cooperation links for festivals by music style

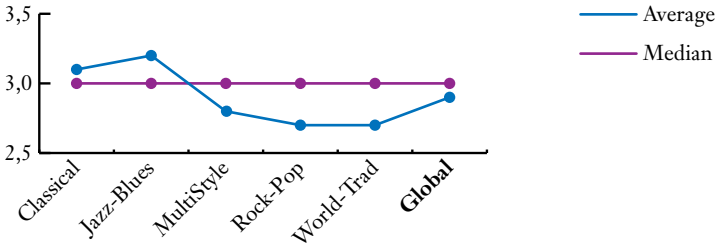
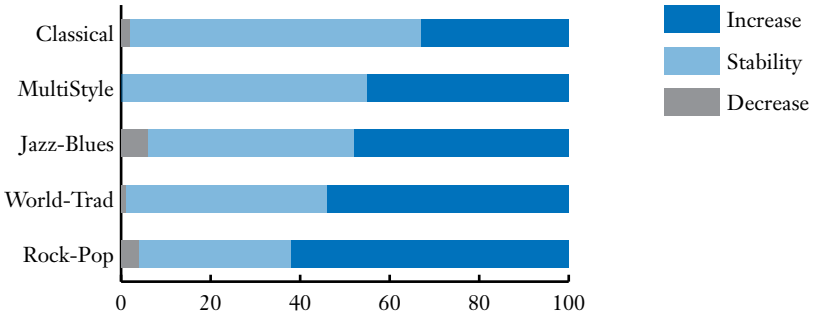


Figure 63. Extent of cooperation as a changing trend



In the above figure, it is precisely the musical genres showing a slightly lower amount of cooperation that anticipate the growth of cooperative strategies in the future.

Cooperation in all its various forms, then, is not only increasing in frequency but is also becoming a much more common feature of all musical genres. This being the case, it is still true that many barriers to cooperation are indeed present. Not all local bodies are considered to be equally relevant as festival partners, and the national framework continues to play a key role for both local partnerships and the creation of federations. As we will see in the next chapter, this picture, focusing on change as well as constraints and limits, is also pertinent for the communication strategies which festivals adopt.

Chapter 7.
Communication strategies

A festival's success depends on its ability to make itself known, to maintain its brand image, and to share its program with a large potential audience. The short time span of a festival allows it a greater media impact but, at the same time, makes it more difficult for it to maintain this image throughout the rest of the year. The dominant musical genre, its target audience, and its geographical location determine both the strategies and the style of a festival's communication policies. How can a festival elicit a sufficient degree of enthusiasm and empathy so that several thousand festival-goers decide to spend their time and their money to attend it? The continual growth of many events generates competition between festivals as they seek to attract an audience that is more and more demanding. It is thus not only a question of planning the best possible selection of artists but also of being able to communicate in the most efficient way possible.

Communication strategies evolve rapidly, and it is necessary to know how to combine a tight budget with a constant and innovative media presence. To attract new audience members while maintaining customer loyalty, the festival team must reinvent and combine the different technologies and tools at their disposal. Digital communication technologies have transformed the public-relations strategies for cultural events, in particular for festivals. However, the different types of audiences as well as the nature of the festival determine how these technologies are used. For more traditional festivals attracting older audiences, the use of social networks (notably Facebook™) is much less frequent than for those offering contemporary music selections and attracting younger audience members.

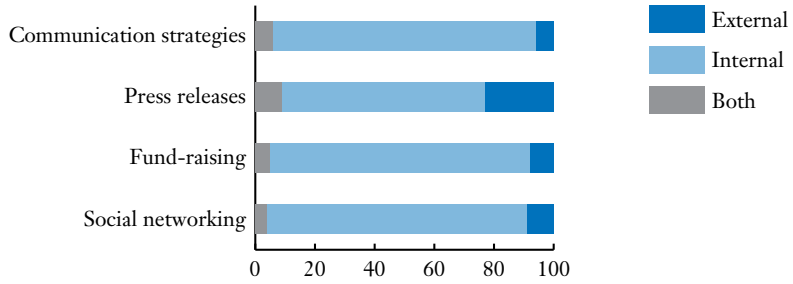
The volume and structure of communication expenses have evolved substantially over the past years. On the one hand, expenses relating to posters and mailing have decreased, though they are still present. On the other hand, social networking sites have become indispensible but necessitate constant upkeep throughout the year. Maintaining a constant flow of information, even if its rate is well planned, requires a festival to have a team capable of selecting the most pertinent information and format of transmission for each period of the year, not only as the festival season approaches but also during its peak season and just after it closes. It is essential for festivals to have a thorough understanding of an audience to be able to determine the kind of information they convey as well as the modes of transmission and interaction they decide to use with the public. This information is no longer only gathered empirically immediately after a concert, as festivals used to do, but is now gathered principally by using specific tools for managing clientele.

In any event, it is interesting to observe that communication expenses have been roughly constant, holding at 12% of the total budget for a festival, independently of the gross income of a festival or the number of audience members it attracts.

Given this context, it is important to understand how different festivals define their communication strategies, how they allocate resources to them, the ways in which they use national and international media, which accredited journalists they welcome, how they distribute their programs, and what ticketing policies they pursue, among other questions.

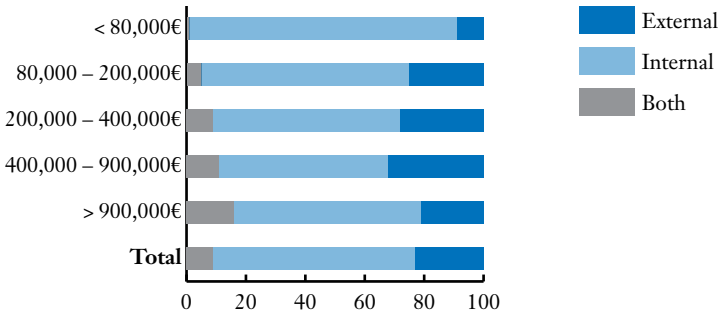
A fundamental feature of communication strategies is that they are almost always implemented by the festival organization itself, regardless of size or musical style. It is very rarely farmed out. Likewise, festival management deals directly with the search for sponsors or involvement in social networks, with only minimal involvement of external professionals. This explains why there is at least one person in charge of the public relations department, with an average of three communications specialists within the department.

Figure 64. Internal/external distribution of communication-related tasks



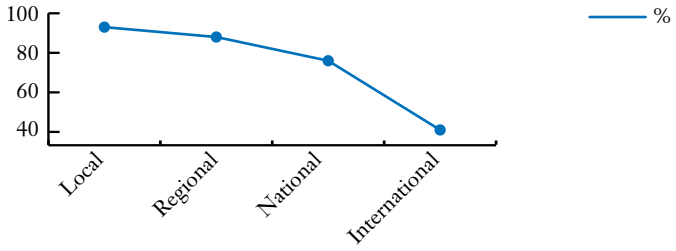
Only press relations tend to be outsourced, though at a relatively low rate. Two reasons can explain a greater degree of outsourcing: the expertise in communication techniques which professionals and specialized companies can provide, and the need festivals with smaller budgets might have for external help. In organizations with more financial resources, we can find a specific press office and the recruiting of external teams. Festivals that have a budget of between 400,000 and 900,000€ (32%) externalize all press-related tasks. The percentage is similar for festivals with a medium-sized budget (between 200,000 and 400,000€). Small festivals, on the other hand, cannot afford to pay for external help, and the person in charge of the creation and coordination of communication strategies is also responsible for media relations.

Figure 65. Internal/external distribution of press management



The media most frequently called upon to advertise the festival brand and its programming are, in almost all cases, local or regional, a fact that is consistent with our understanding of the origins of festival audiences. Only 7% of the festivals studied do not consider using local media, and these generally have very particular programs or highly specific audiences (transnational urban subcultures or audiences that are almost entirely made up of tourists). Inversely, only 6% of the festivals use local media exclusively.

Figure 66. The territorial scale of media use



The extent to which national media are used is based not only on the national significance of a festival but also on its location, that is to say whether it is close to a large metropolitan area which constitutes a zone of influence for national media. On the other hand, the term "regional" can have different connotations depending on the size and cultural homogeneity of a country. Indeed, in some cases, "regional" signifies a very small area, as we can see in the Scandinavian countries. In other cases, we can find much larger geographical and demographic groups which fall under the heading of "region" and which constitute quasi-independent cultural systems: this is the case, for example, for Quebec with respect to Canada, for the different linguistic communities in Belgium, and in some of the autonomous communities in Spain. The notion of "regional media," here, does not have the same meaning.

It is important to note that there are several reasons for using national or international media: the need to reinforce a festival's brand image (sometimes only for the eyes of particular critics as well as for public or private patrons) – this being the most important reason – or the desire to enlarge the geographical range of its audience. In many cases, international communication is limited to magazines specializing in music or style. However, the fact that 41% of the festival group indicate use of international press is a reflection of the desire to transcend national borders, regardless of the number of foreign audience members that are drawn in to the festival. Of course, a larger budget and a bigger audience signify a greater national and international impact, a conclusion that has been confirmed by our data. For the smallest festivals, 47% use the national press and only 22% use the international press. For those having budgets in excess of 900,000€, however, the respective numbers are 95% and 67%.

Figure 67. Festival budget and territorial level of media

	Regional	National	International
< 80,000€	78%	47%	22%
80,000 – 199,999€	85%	70%	24%
200,000 – 399,999€	89%	77%	37%
400,000 – 899,999€	97%	90%	52%
> 900,000€	95%	95%	67%
Total	**88%**	**76%**	**41%**

International communication strategies make use of different tools. The translation of a website into a foreign language, practiced by 71% of the festivals studied, does not necessarily allow them to communicate with professionals or potential audience members from all over the globe. Sixty-four percent of the festivals indicate that they have an international communications policy. In 53% of the cases studied, this involves specific press releases with international media, generally specialized in nature. Forty-two percent of the festivals indicate that they have published advertisements in foreign media, and 14% organize public presentations or press releases abroad. There are no large variations in these practices with respect to the dominant musical style of a festival, but the festivals that have the largest audiences and budget sizes are also more actively involved with international media. More than half of the festivals with more than 20,000 audience members invest in communication strategies with international media, while this is the case for only 40% of the festivals with fewer participants.

Figure 68. International communication tools by audience size

Audience members	Advertising in Foreign Media	Presentation/press conference abroad
< 3,000	29%	6%
3,000 – 5,999	39%	16%
6,000 – 19,999	35%	2%
20,000 – 79,999	63%	23%
> 80,000	50%	17%
Total	**42%**	**14%**

Another communication strategy is based on the number of accredited journalists invited to the festival. The average number of journalists present is 56, while the median is only 13, a difference which demonstrates the wide variety of festivals. 28% of them are only able to attract five journalists, while the biggest and most reputed festivals draw in roughly 500, this being the case for the *Osheaga festival Musique et Arts*, the *Festival International Nuits d'Afrique* or *Les Nuits de Fourvière*. Only a few mega-festivals like *Primavera Sound* exceed this figure.

These differences can be correlated to the dominant musical style of a festival, the country in which it is based, and also audience and budget size. Classical music festivals have an average of 17 accredited journalists. The size of this average is principally due to the fact that 20% of them are unable to attract any journalists at all. The median is then 6.5 journalists. At the other extreme, rock/pop festivals have an average of 121 journalists. Be this as it may, these numbers hide large variations, as we can see when we examine the spectacular difference between the mean and the median. On the other hand, the number of accredited journalists is directly proportional to a festival's budget and the size of the audience it attracts. For festivals with a budget exceeding 900,000€, there are on average 187 media professionals, with a median of 100. For festivals with over 80,000 audience members, the average reaches 239 journalists.

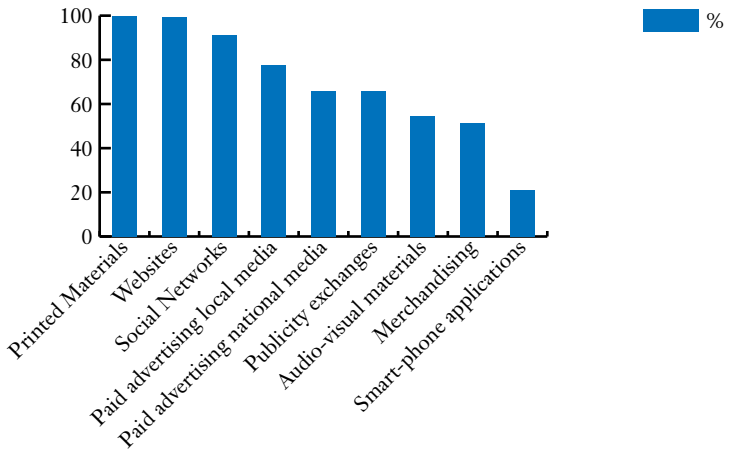
In national terms, the effect exerted by Quebec's large festivals explains not only the average of 77 journalists but also the median of 16.5 which characterizes the province. The smaller scale of these figures for Sweden can be understood in terms of the specificities inherent to Swedish media and the type of festivals within the country's sample: a larger presence of classical music at the expense of rock/pop festivals. Thus, we must be careful when interpreting the national differences measured in the figure below.

Figure 69. Mean and median number of accredited journalists by genre, country, budget, and audience size

	Mean	Median
Classic	17	6.5
Jazz-Blues	40	12
MultiStyle	37	20
Rock-Pop	121	34
World-Trad	45	15
< 80,000€	7	3.5
80,000 – 199,999€	14	10
200,000 – 399,999€	19	10
400,000 – 899,999€	34	18
> 900,000€	187	100
France	51	12
Spain	55	10
Wallonie	53	11
Quebec	77	16.5
Sweden	34	5
< 3,000 spectators	11	5
3,000 – 5,999 spectators	18	10
6,000 – 19,999 spectators	34	20
20,000 – 79,999 spectators	108	50
> 80,000 spectators	239	122
Total	**56**	**13**

To attract audience members, festivals use many different communication tools ranging from print (posters, brochures, flyers, leaflets, or banners) and print-based advertisements all the way to digital media. Practically all festivals print advertisements, have a website, and use social networking sites. More than two-thirds advertise in local or national media and publish a column in the press or use other services provided by the media. Half of the festivals in our sample edit their own audio-visual materials and produce merchandise (t-shirts, caps, pins, etc.). However, only 21% of them have developed smartphone applications to advertise their program and to develop relationships with the public via telephone or tablets.

Figure 70. Communication tools



The lesser degree to which the last three communication tools are used allows us to analyze differences by genre, by the average age and size of the audience, or by the budget size. As expected, the festivals that are the most active in terms of merchandising, audio-visual production, or the development of smartphone applications are also those which have a sizeable contingent of audience members under 25 years of age, namely rock/pop festivals. At the other extreme, classical music festivals (with older audiences) have 30 fewer percentage points than rock/pop in terms of smartphone application development or audio-visual production. Moreover, 15% of classical music festivals do not have an account with a social networking site.

A good way to understand the characteristics of a festival's communication policies is to analyze its website. First of all, the fact that a festival possesses its own domain is an indispensible condition for being able to develop its image and provide access to services throughout the year. Eleven percent of the festivals surveyed do not have their own website. This can be the case because some festivals are subsidiaries of larger institutions (either businesses or governmental bodies) which require them to use the umbrella institution's website. As a result, they lose some of their autonomy and thus their ability to provide certain services. Indeed, occasionally they are only visible to the public for a short period of the year. The absence of a festival website could also mean that these festivals do not yet attach much importance to the digital world, a situation which has now become exceptional and tends to characterize very small festivals attracting very small and exclusively local audiences.

Figure 71. New communication tools and types of festival

	Social Networks	Smartphone applications	Audio-video material developed by the festival	Merchan-dising
Classical	85%	8%	44%	60%
Jazz-Blues	91%	21%	45%	74%
MultiStyle	83%	33%	50%	50%
Rock-Pop	100%	38%	73%	74%
World-Trad	94%	20%	57%	63%
< 80,000€	88%	6%	38%	29%
80,000 – 199,999€	88%	3%	44%	41%
200,000 – 399,999€	86%	19%	51%	55%
400,000 – 899,999€	97%	26%	60%	54%
> 900 000€	99%	48%	73%	75%
< 2,999 participants	84%	4%	45%	40%
3,000 – 5,999 participants	89%	19%	41%	43%
6,000 – 19,999 participants	94%	16%	62%	56%
20,000 – 79,999 participants	100%	41%	65%	65%
> 80 000 participants	97%	55%	79%	76%
< 25 years old	98%	41%	76%	69%
26 – 40 years old	96%	28%	65%	49%
41 – 60 years old	88%	11%	44%	47%
> 61 years old	87%	3%	33%	40%
Total	**91%**	**21%**	**55%**	**51%**

Regardless of the domain or the type of formatting, the content and services a website provides are as varied as its esthetic appearance. While some festivals use a website almost exclusively to publish their program, others also make available provisional programming, dialogue with their Internet audience, and facilitate access to other touristic services or practical and cultural information about the region. For example, 37% of the festivals include links to other festivals on their website.

The first step toward Internet sophistication is to allow on-line ticket reservations and purchases, either through the festival's own site or through external ticketing services. This is the case for 67% of festival websites, but a closer look reveals a wide degree of variation. While only 28% of festivals with a budget below 80,000€ offer ticketing services, virtually all

festivals with a budget over 400,000€ do so. Musical genre and audience age do not seem to have an effect on the data. Surprisingly, on-line ticketing services are used by 86% of festivals with an audience of over 60 years of age, whereas one would have expected Internet ticketing services to be more frequent for festivals with younger audiences. Here, we can see another indication of the pace of change in this sector of communications and the ability for festivals to adapt themselves to these changes regardless of audience age or musical genre.

Figure 72. Web services by music style, budget size, and audience size

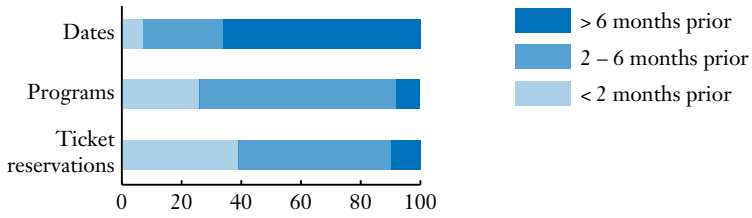
	Incorporation of RSS feeds	Visitor comments allowed	Ticketing links
Classical	14%	21%	65%
Jazz-Blues	31%	27%	62%
Multi-style	28%	33%	72%
Rock-Pop	38%	39%	73%
World-Trad	21%	41%	61%
< 80,000€	11%	25%	28%
80,000-199,999€	16%	23%	59%
200,000-399,999€	27%	31%	70%
400,000-899,999€	26%	32%	87%
> 900,000€	43%	43%	89%
< 2,999 participants	13%	27%	50%
3,000 – 5,999 participants	24%	27%	63%
6,000 – 19,999 participants	25%	27%	79%
20,000 – 79,999 participants	33%	44%	82%
> 80 000 participants	50%	36%	82%
< 25 years old	30%	41%	76%
26 – 40 years old	35%	40%	66%
41 – 60 years old	17%	24%	61%
> 61 years old	21%	17%	86%
Total	**25%**	**31%**	**67%**

There are, however, differences on other levels. Generally, a higher quality website offers a greater number of services. For example, a quarter of festival websites incorporate an RSS service which allows an Internet user to receive information he or she selects automatically. Most websites belonging to smaller festivals, either in terms of audience size or budget, do not offer these services. Rock/pop festivals, where audience members are daily users of these

technologies, have a higher rate of services being offered (38%), whereas this is the case for only 14% of classical music festivals. Another service offered by roughly a third of festivals is the interactive approach of on-line forums. This is an example of another form of communication involving more audience interaction and, sometimes, criticism. World/traditional music festivals as well as those with larger budgets or younger audiences are the most open to this approach. Here, as with other possibilities offered by new technology, classical music festivals display much less interest in digital interaction with audience members.

In terms of festival communication, releasing the program has become a strategic lever. When and where the program is released as well as how audience members can reserve tickets is highly indicative of the sort of communication strategies a festival opts for. Why, for example, do some festivals wait until the last minute to reveal their full program, sometimes even after their tickets are on sale? Clearly, not every festival has the luxury of selling their tickets without publishing all the details of their program. Some festivals rely on the confidence they have built between their audience members (especially those who are the most dedicated) and the organizers. Several factors come into play. First, there is the question of surprise in order to have a larger media impact and to arouse enthusiasm. This communication strategy plays on how a festival manages information and audience expectations. For example, large prestigious festivals such as *Primavera Sound* begin selling tickets for the next season immediately after the current season closes, long before the program has been established. Other festivals gradually release information on the artist list so as to maintain audience suspense, to generate interest in their websites and audience forums, and to stimulate media attention, all of which encourages ticket sales. However, these strategies are much more plausible for very short and intense festivals where ticket sales for individual concerts are replaced by daily or seasonal passes. More generally, one can observe that two-thirds of the festivals reveal the dates for their season at least six months in advance. This, however, is not the case for their programs or the dates at which ticket reservations are made available, both of which are published later.

Figure 73. Public availability of festival dates, programs, and ticket reservations



In general, festivals with bigger budgets take longer to release programming information to their potential audiences. The relationship between festival size and national origin allows us to see the largest variations in festival behavior on this particular point. The largest festivals generally announce their dates and programs and open up ticket sales earlier than smaller festivals. They avoid taking unnecessary risks in organizing their festivals, a strategy which makes it easier for them to work efficiently.

The cultural variable is important in its own right. Festivals that are located in countries that have a Mediterranean culture and climate – well illustrated by the Spanish festivals in our sample – tend to release their programs later than festivals in more northerly latitudes. Forty percent of the Spanish festivals (as opposed to 18% in France) announce their program less than two months in advance, and 61% do not allow ticket reservations before this (as opposed to 33% in France). The largest proportion of smaller, more local festivals in Spain can only partially justify this decision, though Mediterranean audiences and organizers tend to display different behavior from their northern counterparts.

Figure 74. Availability dates for programs and ticket reservations by country

	< 2 months		2 – 6 months		> 6 months	
	Program	Ticket reservations	Program	Ticket reservations	Program	Ticket reservation
France	18%	33%	78%	59%	4%	8%
Spain	40%	61%	54%	32%	5%	7%
WBF	27%	36%	65%	53%	8%	11%
Quebec	35%	42%	56%	50%	9%	8%
Sweden	26%	35%	65%	48%	9%	17%

The differences observed when we look at musical genre are much smaller than those related to nationality. Nevertheless, we notice that the festivals which release their programs the earliest are rock/pop, while classical music, jazz/blues, and world/traditional music festivals are very homogeneous in this respect.

Finally, we can see a close relationship between the existence of discounts for purchasing tickets or passes in advance and the date at which it is possible to reserve or buy them. Similarly, festivals which offer a day pass allow ticket reservations and purchases earlier than other festivals.

Figure 75. Release dates for programs by music style

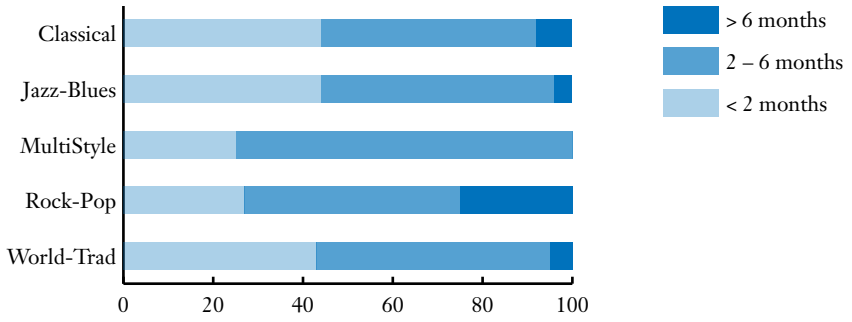
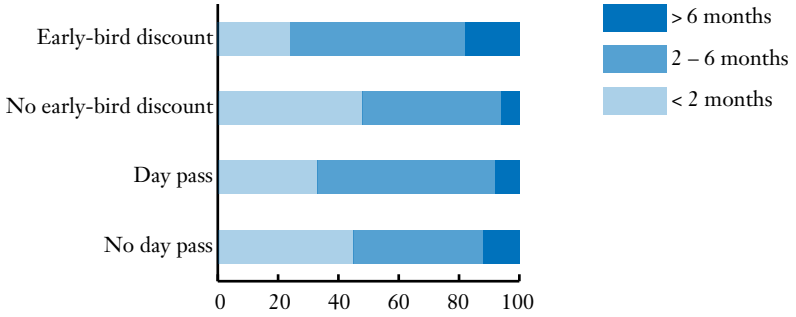


Figure 76. Ticket sales period, early-bird discounts, and day passes



The communication strategies vary from festival to festival but do present some general trends. Though festivals which have larger audiences and more financial means dedicate the same percentage of their budgets to public relations as their smaller counterparts, they can develop more diversified and complex communication strategies. This is because the higher costs associated with these strategies are situated within a festival economy that is on a larger scale.

Rock/pop festivals distinguish themselves from classical music festivals, among other ways, by their more intensive use of the different communication tools now available, in particular by the most recent technologies. The only exception to this rule can be found in advance ticket sales and reservations. The variable of audience age, closely related to the dominant musical genre of a festival, plays an important role in determining which tools a festival will use to reach and interact with its potential audience. In sum, the success of a festival depends in large part on the ability of the organizers to transmit an appropriate message to its audience, to increase the prestige of its brand, and to adjust the relationships it has with professionals and audience members throughout the year. The changes which have been affecting this

domain, while not significantly increasing costs, do indicate a longer period of activity as well as a more individualized approach to communication, both of which have been made possible by digital innovations.

Chapter 8.
Human resources and festivals

The management of human resources is an essential component in any institution or cultural project, and this is especially the case when the majority of collaborators are only involved in its final stages, that is to say for a few weeks or only a few days. For what reason do so many key collaborators come back year after year, and why are they so actively involved in the festival? Is it the magic of the festivities or the personal appeal of the organizers? Since there are very few training possibilities available to staff members prior to a festival and it is very difficult to correct last minute hiring errors, festival teams must consider the question of quality control in their hiring practices.

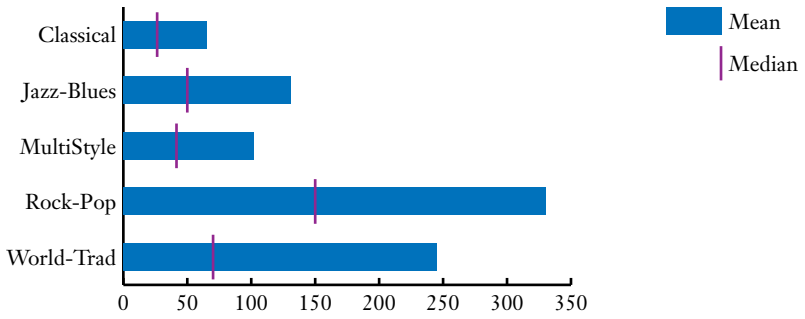
Given the diversity in our sample, there might be as many ways to answer these questions as there are types of festivals. Planning an intensive three-day festival under the umbrella of a for-profit organization is very different from setting up a participatory festival with a large number of volunteers and a more extensive range of events.The number of people working for a festival can be very large. In some exceptional cases, this can exceed 2,000 collaborators. This is the case for *Primavera Sound*, *Sweden Rock*, *Esperanzah-Wallonie*, or the *Dour Festival*, for example. However, a more general analysis of our data places the average at 180 workers with a median of 51. This indicates that, excluding very large festival organizations, the standard staff size necessary for setting up a festival is around 50 employees. Beyond a festival's size and musical genre (two essential factors in understanding how human resources are allotted), it is necessary to take into account the total number of volunteer workers in order to interpret the data correctly. However, this key factor expresses a high degree of variation in terms of the national context and the period of the year during which the festival season takes place.

Of course, the number of professionals who work to produce a festival is proportional to its size. This can be measured in terms of its budget and the number of its audience members. A festival with fewer than 3,000 ticket sales has an average of 45 employees, whereas one which draws in over 80,000 festival-goers will have 466. With a budget lower than 80,000€, a festival will employ 35 people, while one with a budget exceeding 900,000€ will have an average of around 500 people working for it.

A festival's musical style is also a decisive factor. There is a close relationship between the number of collaborators and the dominant musical style. Classical music has on average 65 employees, world/traditional music reaches 245 staff members, and rock/pop has 330. Within each of these groups, however, we can find a great deal of variety since the median for almost all musical

genres is less than half of the mean. This signifies that, for each genre, a handful of large festivals artificially inflates the average since the median here corresponds to a more realistic assessment of the human resources of a large number of festivals.

Figure 77. Mean and median number of festival collaborators by musical style



Summer festivals, including those taking place during the months of June and September, have a significantly higher number of workers. While the average figure for the other months is 110 people, in summer this increases to more than 200. This cannot be explained by festival size or musical style as there does not appear to be a meaningful relationship between these variables and the season of year during which a festival takes place. The real reason for this increase is due to heavier volunteer participation during the summer months.

The length of a festival's season does not necessarily suggest a larger staff size. Here one must take into account the strategies of rock/pop festivals which tend to concentrate their season into a limited number of days, whereas the season for classical music festivals is longer in terms of days but with fewer daily concerts (often one concert per day).

The majority of festival employees only participate directly during the festival's season. Globally, out of an average of 180 collaborators who participate in the festival, only 31 (17%) begin working before the start of the season, and 16 of these workers are involved exclusively during the month preceding its opening. Only 5 people (3% of the total) make up the core staff. Moreover, these core staff members do not always work full-time throughout the year, since we are concerned with employees and not full-time equivalents (FTE). During the off-season, the workload of the permanent team is much lighter, even when a festival takes on other activities during this period, as we saw in the chapter on festival activities. These are thus staffing configurations that are intermittent and seasonal in nature, and the festival organization itself is unable to guarantee continual work to all but a very small number of

professionals. Despite this, a large number of festivals have a relationship with their collaborators such that they come back to work for them year after year. This is linked to the enthusiasm of these collaborators and their commitment to festival organizations that, in addition to providing professional experience, are attractive because of the cultural project, their values, and their originality much more so than would be a more standard enterprise. It is also a result of the trust and empathy festival directors are able to instill, particularly in those who occupy key positions in the festival. Here, one must distinguish between the security or cleaning services and those who work directly with artists or address technical problems.

Figure 78. Work seasons for festival staff

	Number	Accumulated	Average percentage
Work throughout the year	5.4	5.4	
Between 5 and 10 months beforehand	3.1	8.5	57%
Between 1 and 4 months beforehand	6	15	71%
During the month before the festival	16	31	110%
During the festival only	150	180	490%

It is essential for a festival to retain the loyalty of its most direct and strategically important collaborators. Indeed, festival organizers cannot risk entrusting the most important tasks to employees who do not possess a relevant knowledge base, a sufficient degree of experience with the festival space, or work methods that are often acquired on the job and which are highly specific to each festival. The immediacy of festival work does not often allow for a training period prior to the start of the season nor does it permit festivals to easily replace inappropriate personnel. During the festival, each collaborator must be able to act with a high degree of autonomy, responding to any situation without having to seek the approval of festival directors who are occupied with other tasks. It is not only a question, then, of thoroughly planning how the staff is distributed and what emergency procedures to follow but also of knowing how to choose employees who are able to respond adequately and independently to the situations with which they are confronted.

It is thus interesting to look closely at the professional status of collaborators and determine whether they have a professional or altruistic relationship with the festival directors. Because of varying collaborative traditions or labor laws, there are significant differences between countries. Globally, out of an average

of 180 staff members, 121 are volunteers, 25 are salaried, 19 are either contracted or lent from external organizations, 13 are free-lance professionals, and 2 are interns. These figures are much higher than their respective medians, indicating the enormous variations in festival staffing both at the level of individual festivals and with respect to country or musical style.

Figure 79. The number of staff members by professional status

	Mean	Percentage	Median
Salaried employees	25	14%	**5**
Freelance professionals	13	7%	**2**
Interns	2	1%	**0**
Volunteers	121	67%	**23**
External personnel	20	11%	**0**
Total	**180**	**100%**	**51.5**

These figures vary considerably from country to country. While Spanish festivals have an average of 19 volunteers (21% of the total number of staff members), their French counterparts have 83 (56% of the total), Flemish festivals have on average 377 volunteers (97% of the total) and Walloon festivals have 209 (92% of the total). In addition to the season of year (i.e., a smaller number of Spanish festivals during the summer) and the dominant musical genre in each country, there are many other reasons for these differences. The forms of participation in a festival cannot be dissociated from the political history of a country and the impact this currently has on the civic involvement of its citizens.

Figure 80. The number of staff members by professional status and country

	France		Spain		WBF		Quebec		Sweden	
Salaried employees	36	24%	20	22%	5	2%	55	30%	6	3%
Freelance professionals	17	11%	9	10%	12	5%	17	9%	6	3%
Interns	3	2%	1	1%	1	0%	2	1%	0	0%
Volunteers	83	56%	19	21%	209	91%	102	55%	189	90%
External personnel	9	6%	41	46%	3	1%	9	5%	10	5%
Total	**148**	**100%**	**90**	**100%**	**230**	**100%**	**185**	**100%**	**211**	**100%**

Countries which have undergone long periods of dictatorship have less entrenched civic involvement than those with long democratic traditions.

Indeed, dictatorial regimes are inherently suspicious of any social organization escaping their control. In Spain, the explosion of festivals during the 1980s and 1990s coincides with two historical phenomena. The first is the weakening of the Catholic church and its decreasing social legitimacy, the Church having been the only authorized participatory body under Franco's regime with, naturally, the exception of its sole political party and associated organizations. The second phenomenon is the behavior of its citizens. Thus, citizens have tended to voluntarily transfer the responsibility for cultural activities to new democratic institutions concerned with welfare or cultural well-being. These two phenomena coincide with a social model privileging more individualistic values and thus not recognizing the work and skills of volunteers. Rather, it places more weight on commercialized relationships between service providers and their clients, particularly in the case of large associations. The majority of positions that are held by volunteers in countries similar to Spain (where there is also a high unemployment rate, for example) are distributed to paid personnel, often with extremely low wages. There are, of course, a few festivals with a large number of volunteer staff members. These are the result of specific socio-cultural contexts and a great deal of social outreach on the part of a festival's promoters, the *Festival de Cantonigròs* being a case in point. These exceptions indicate that a country's cultural history does not dictate its present, though it does provide a context which affects a great number of festivals. Parallels to the Spanish situation can be found in southern and eastern Europe, where authoritarian regimes have also marked their recent past.

There are more volunteers during summer festivals, corresponding to the increase in free time which the summer months offer. From July to August, there is an average of 147 volunteers, while this figure increases to 152 for the months of June and September. Festivals held from October to May, however, show an average of only 55 volunteer staff members. Volunteering, especially in rock/pop and world/traditional music, is not motivated by purely altruistic reasons. For a large number of volunteers, it represents a way to participate in the festival and to be a part of the audience without having to pay entry fees that are, at times, prohibitive for young people without steady employment.

The flip side to the high number of volunteers, though this is of unquestionable social and civic importance, is the weak impact of festivals on the job market. Each festival hires either directly or indirectly an average of 61 paid professionals (artists excluded), most of whom work only during the peak season. 'Indirectly' often means sub-contracting using outside companies or using employees lent by the city or partner organizations. These figures vary both in absolute terms and also in figures relative to the musical style of the

festival. Paid employees represent only 12% of the staff of jazz/blues festivals, while for rock/pop and classical music, they represent 48% and 49% of their respective work forces.

There is a higher concentration of paid employees providing services (mainly in the cleaning and security sectors), and in technical production (installing or dismantling equipment, working as lighting and sound engineers, etc.), with respective averages of 24 and 15 employees. In general, work of a higher value and requiring a greater level of expertise is limited to a very small number of personnel, though filling these posts demands a longer recruitment period: 9 staff members in management, production, and administrative positions; 3 in communications and marketing; and 2 in artistic programming. The 7 remaining staff members are employed in other higher level positions. When analyzing the data by musical genre, we can observe significant differences in hiring practices. For rock/pop festivals, the service industry has a 51% share of paid workers, while this decreases to only 9% for classical music. These numerical differences, both in absolute and relative terms, reveal large variations in the organizational complexity of festivals.

Figure 81. Number of staff members by festival department and musical style

Department	Classical		Jazz-Blues		Multi-style		Rock-Pop		World-Trad	
	Mean	%	Mean	%	Mean	%	Mean	%	Mean	%
Artistic programming	1	4%	2	4%	1	4%	2	2%	2	4%
Management/ Administration/ Production	7	22%	9	21%	6	20%	11	9%	6	18%
Communication	2	6%	4	9%	1	4%	4	3%	2	5%
Technical	12	36%	14	35%	10	38%	22	18%	13	36%
Services	3	9%	10	26%	7	25%	60	51%	10	29%
Other	7	22%	2	6%	3	10%	19	16%	2	7%
Paid workers	**32**	**100%**	**41**	**100%**	**27**	**100%**	**118**	**100%**	**36**	**100%**
% Paid workers/total workers		**49%**		**12%**		**21%**		**48%**		**35%**

Each department within a festival requires its personnel to possess a highly specific skill set, a fact which is all the more important given the degree of autonomy which this type of event requires from its workers. It is these skill sets that are the crucial factor when selecting employees. We thus asked festivals which professional skills (both interdisciplinary and highly

specific in nature) they require for the heads of different departments. Out of a list of 15 skills, the festivals were asked to indicate a maximum of four per sector. The results confirm that teamwork and planning skills are by far the most important. These were followed by having solid professional contacts, being able to generate empathy, and being a strong communicator. Our data shows that the most important skills vary considerably according to the field of expertise required by each high-level position. Having teamwork skills is essential for technical positions as well as management and production roles, while having access to a network of professional contacts is considered to be much more vital for heads of the artistic programming, media, and communications departments than for other positions. We can plausibly suppose that having an artistic sensitivity is necessary for working with artists, organizational skills are essential for working in management or production, and being gifted with empathy or communication skills can be strongly associated with… communications! Other skills include the ability of an administrator to lead his or her festival team or an artistic director to maintain a strong vision for the festival. A skill set that is considered to be less important but nevertheless required for communication roles, especially within festivals with international ambitions, is the mastery of foreign languages. Finally, it is surprising to see the lack of importance accorded to social or professional leadership skills outside of a festival's organization and also to an active participation in international networks.

The gender ratio of personnel is a question which attracts a great deal of attention in the field of human resources. Senior management of festivals follows certain evident trends, such as the higher proportion of men than women in high-level positions. The general management of a festival is on average 63% male, a percentage rising to 76% in technical and production positions and to 68% for artistic managers. Women, on the other hand, are more dominant in public relations positions (58%) and in festival administration (52%). In a certain number of festivals, the tasks corresponding to high-level positions are shared among several people. For example, the average number of directors is 1.5 per festival, but only 9% of the festivals studied have a gender-balanced directing partnership (woman-man).

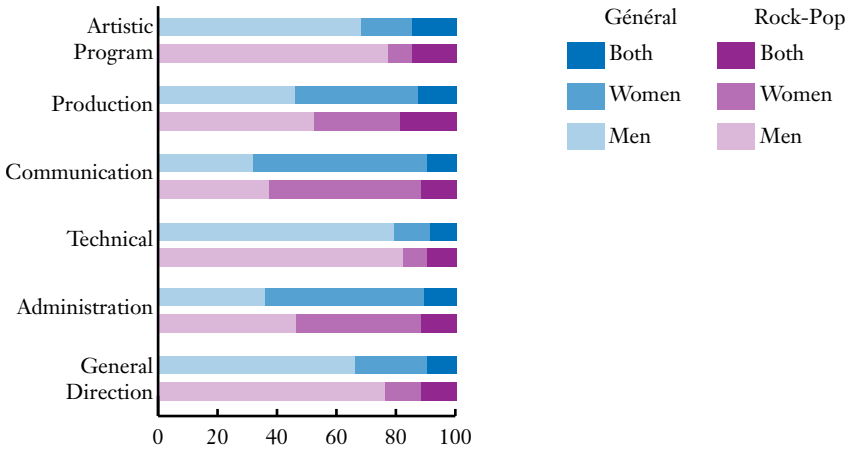
Figure 82. Professional skills required by department heads

Professional skills	Artistic	Management – production	Communication	Technical	Rate of repetition
Ability to work in a team	16%	51%	32%	63%	**1.57**
Planning skills	22%	75%	32%	29%	**1.54**
Professional contacts	56%	17%	46%	21%	**1.37**
Empathy and communication	24%	34%	72%	2%	**1.31**
Artistic sensitivity	81%	8%	12%	10%	**1.10**
Internal leadership skills	7%	53%	6%	25%	**0.89**
Analytical skills	8%	36%	14%	32%	**0.88**
Computer skills	1%	16%	38%	30%	**0.83**
Ability to speak foreign languages	21%	18%	41%	3%	**0.81**
Theoretical understanding of the subject	15%	8%	16%	36%	**0.73**
To be a visionary	52%	10%	9%	4%	**0.73**
Regular immersion in cultural activities	40%	6%	12%	5%	**0.63**
Entrepreneurial spirit	9%	29%	10%	14%	**0.61**
External leadership	8%	18%	13%	6%	**0.45**
International activism	19%	3%	15%	3%	**0.39**

Rock/pop festivals have the highest percentage of males in leadership roles. This does not only characterize the festival organization itself but also the artists, intermediaries, and its audience members, despite some recent trends toward the feminization of rock audiences. In other types of festivals, women are far more present, a fact that is related to an audience which has a higher rate of female attendance, though the festival positions which have more social or professional importance (festival heads or artistic directors) are more often occupied by men. Increasing the number of women working in high-level positions is a slower process than in other cultural projects, especially given the job instability inherent in a temporary event such as a festival. Thus, while most of the Western world has experienced a rapid increase in women holding positions as cultural administrators, this increase remains much lower for festivals, some of which are still headed by their original (often male)

founders. A relatively low number of festivals – 30% – indicate that they have seen an increase in the number of female employees between 2008 and 2011, while 67% have remained stable. Three percent of the festivals have in fact increased the proportion of male employees.

Figure 83. Gender and management by festival department



As we have seen, some festivals have more than one director, though only 10% have three or more people who occupy this role. It would appear that co-direction is more an emerging practice. Indeed, festivals that are less than ten years old have an average of 1.65 directors per festival, whereas those that are over thirty years old have an average of 1.35. Looking to musical style, jazz/blues and world/traditional music festivals tend to have only one director, while for rock/pop festivals it is more common to see this role shared between two or more professionals.

There is also the question of the director's age and the length of time s/he has held this position. The average age of a director and the length of time s/he has been employed (either for the sole director or the senior member in cases of festival co-direction) are 51 years old and 12 years, respectively. This suggests s/he began working in this type of position at the age of 39. When there is a second director, the average age decreases to 44 with 8 years of experience. In cases where there is a third director, the average age is 39 with 7 years of experience. In this third case, the director's 'career' would have begun at the age of 32. The youngest festivals are generally also those with the youngest directors, as is to be expected. On the other hand, we could have expected to see more variation by musical genre (and the audience age which is associated with it). In reality, this variable seems to have little real impact here. On average,

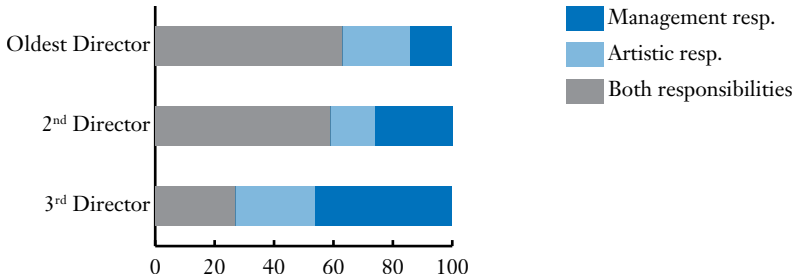
the head of a rock festival is not much younger than his/her counterpart in the classical world.

Figure 84. Number, age, and years of experience of festival directors by genre

		Oldest director		2nd Director		3rd Director	
	Mean directors by festival	Average Age	Years in charge	Average Age	Years in charge	Average Age	Years in charge
Classical	1.52	51	12	45	8	40	11
Jazz-Blues	1.23	53	13	41	5	34	4
Multi-style	1.44	53	11	44	10	–	–
Rock-Pop	1.7	49	13	43	8	38	5
World-Trad	1.39	50	11	47	10	42	6
Total	**1.5**	**51**	**12**	**44**	**8**	**39**	**7**

Festival management does not include the same positions for all festivals. For most of them, the role of artistic director is inseparable from the role of general director. For others, the management responsibilities of the general director are much heavier, and the role of artistic director must be delegated to several other people – especially in festivals which combine many different musical styles or artistic disciplines – or to the separate position of artistic director. With co-directed festivals, the tasks related to the artistic director are shared. In the case of festivals with three directors, the youngest will most often be in charge of festival management responsibilities.

Figure 85. Distribution of artistic and management responsibilities among festival directors



Between 2008 and 2011 – this corresponding to the three-year period following the beginning of the economic and budgetary crisis – most of the countries studied have not shown a big impact either on the general situation of festivals or specifically on their staff structure. The development in human resources does not show large and meaningful changes. We can observe that most festivals display

moderate growth in the number of employees, volunteers, and interns as well as, to a lesser degree, foreign personnel. In terms of musical genre, as we said earlier, there is a slight increase in the ratio of women holding high-level positions.

What might seem surprising, and which therefore is worthy of comment, is the low rate of foreign employees within the festival organization and in high-level positions, even though there is a significant number of foreign artists invited to festivals. Here, the need to thoroughly understand the frameworks, processes, values, and personalities of the world of art and of local cultural policy is crucial. As has already been noted, possessing a network of professional contacts is considered to be an essential asset for artistic directors as well as for those in communication or media roles. This knowledge and skill is acquired cumulatively over a relatively long period, and usually on the job, rendering the employment of totally external resources somewhat delicate.

Looking to musical style, only rock/pop and world/traditional music festivals display significant increases in the total number of workers, interns, and volunteers. The least dynamic sector between 2008 and 2011 has been classical music. Despite the ratio of classical music festivals increasing their work force to those that are showing a decrease (24% as opposed to 12%, with 62% showing stability), this figure is much lower than the other musical genres. This characteristic is consistent with other variables we have studied, and we can also find a lower growth rate for this genre's aging audiences and its activities.

The heavy recruitment of volunteers (and, to a lesser extent, interns) in a large number of festivals (51% for world/traditional and 49% for rock/pop) expresses not only a need to fill certain roles with unpaid workers but also a much more important need: to intimately link the biggest fans to festival activity. The fact that most festivals take place during the summer and a majority of their audiences are younger contributes significantly to the younger generation's interest level and support.

Figure 86. Changes in the employment by musical genre, 2008-2011

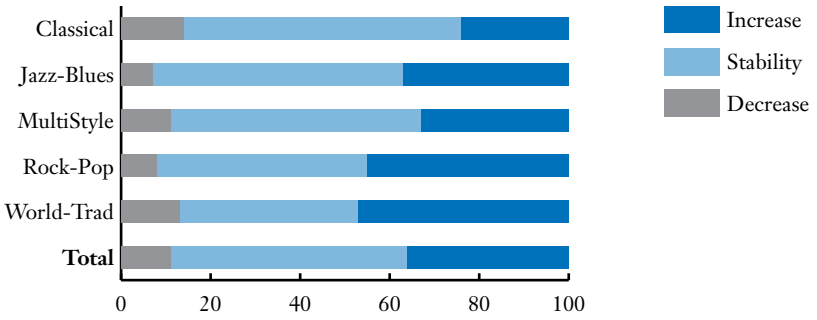
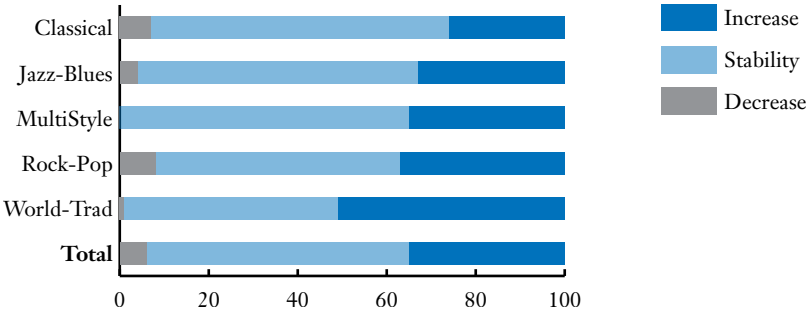


Figure 87. Changes in volunteer/intern staffing



The temporary and intermittent nature of festivals determines how they manage their human resources. Despite the growth of its activities, festival organization remains profoundly marked by this fact. On the other hand, such factors as the season of year, festival size, and artistic expertise explain not only the number of workers involved but also the specialization of its personnel. Another determining factor is the social and political culture within each country. Indeed, beyond questions of national law and governmental subsidies for festivals, elements such as the role played by volunteers or changes in the number and nature of personnel hired depend upon specifically national considerations such as history, tradition, and culture. Finally, it is interesting to observe the parallels between the gender ratios of audiences and of festival heads. The most masculine musical styles (pop/rock) have a higher concentration of men working in their senior management than world/traditional music or classical music. Nevertheless, one can observe a low rate of inclusion of women in technical or artistic positions and as festival heads.

Chapter 9.
The six clusters of festivals

It is not easy to present a synthesized view of a landscape that is as highly varied as that of festivals, as we have already observed. There are important differences in crucial issues such as employment, the extent of the program, and budget size. This has often led us to stress the artificial nature of many of the average figures we have presented, relying instead on the median. In this concluding chapter, we will take advantage of this diversity by grouping the festivals presenting certain affinities into six different clusters. These affinities emerge when we examine a combination of five variables. The first of these is the ratio of artistic costs to total festival expenditures. The second is the size of subsidies relative to total festival revenue. The third is the proportion of free admissions, calculated by comparing the number of audience members attending free concerts to the total number of audience members. The fourth is the ratio of the number of volunteer workers to the total number of festival workers. The fifth is the total budget size, i.e. the total expenditure.

These indicators were not chosen randomly. Other data could be used in future analyses, but it seemed to us that these five variables have a crucial role in structuring the festival landscape. Subsidies, artistic costs, and budget sizes are crucial indicators for festival activity; money seems to make the festival world go round, even if it is far from providing a total explanation. The proportion of volunteer workers expresses the social and cultural dimension of a festival's philosophy. The issue of free admissions helps us to conceptualize the way in which a festival constructs its relationship with its public and its stance on accessibility. These five variables do not appear to correlate with each other – a necessary condition for our statistical analysis to be meaningful.

We have chosen to take into account rates rather than absolute values in order to prevent budgetary data from obscuring the richness and diversity of our sample. We have nevertheless chosen to keep the budgetary variable so that festivals with similar budget sizes can be compared. We were unable to retain 19 of the festivals in our sample because of a lack of information. Therefore, this analysis will be based on a sample of 361 festivals. In the figure below we show, as percentages, the average and median for each of the indicators for the entire sample (calculated as explained in the first paragraph above).

We can see that some trends emerge. Two of these, when expressed in percentages, show themselves to be relatively homogeneous, showing no major discrepancy between average and median. These are cost of performers on the one hand and public funding on the other. The figures concerning free admissions show a greater difference with the average being slightly more than a

third and the median only one-fifth. This is because, as we have already seen earlier, a small number of festivals have adopted entirely or almost entirely the practice of free concerts (41), and this inflates the average. Concerning volunteers, we can see the opposite: the 75 festivals which have no volunteer workers deflate the average whereas the median is much higher.

Figure 88. The key variables for festival clusters

Variable	Average	Median
Cost of performers	50.1%	50.0%
Public funds	44.2%	43.9%
Free admissions	34.6%	20.7%
Volunteers	54%	63%
Total expenses	**860,083€**	**272,705€**

Finally, there is a much greater discrepancy when it comes to budgets, where the average is almost three times the size of the median. Here, we can see that a few very large festivals inflate the average, as we will find when we look at the rather remarkable cluster 6. This cluster only contains the four festivals in the highest stratum of the figure below, which classifies festivals into categories based on budget size.

Figure 89. Festivals by budget size

Expenses in 2011 (K€)	Number of festivals	% of sample
> 10000	4	1
> 5000 – < 7500	8	2
> 2000 – < 5000	27	7
> 1000 – < 2000	32	9
> 500 – < 1000	53	15
> 200 – < 500	87	24
> 100 – < 200	57	16
< 100	93	26
Total	**361**	**100**

An analysis of these clusters shows deviations from the average figures, both in terms of increases and decreases. In our graphs, as we will see later, these averages are placed at the level "0," with each family expressed by a figure either close to the overall average (thus close to "0") or above or below it.

When looking at all five variables simultaneously, we have been able to discern six different clusters. A cluster can be defined as the proximity between

festivals in terms of these five variables. This does not mean that all festivals within the same cluster gave the same information on each point. Within a cluster, there can be large differences on one of the indicators but a high degree of affinity with all of the others, or it might be sufficient for one cluster to be more appropriate for a festival than any of the other clusters. In short, these "families" do not just bring together twins or brothers but also their cousins.

Once we have explained the specific combinations of variables in our cluster-based analysis, we will look at the relationship with other variables. This will help us to interpret these combinations. Here are these variables, with their general average for the entire sample.

Figure 90. Indicators for the analysis of clusters

Indicator	Average	Median
Festival age	21.5	18
Number of concerts	44.7	25
Total audience size	37,824	7,880
Total ticketing	310,546	47,998
Number of paying customers	12,097	3,778
Total revenue	887,943	270,885
Ticketing sales/total revenue	26%	23%
Seat cost*	19.1€	14.7€
Spectator cost*	41.5€	31.2€

* It is necessary to explain the difference between seat cost and spectator cost. The first is expressed by the ratio of total ticket sales to the total number of audience members having paid for a ticket. It does not take into account free admissions and shows the average price of admissions. The spectator cost is the ratio of total festival expenses to the total number of admissions, whether free or not.

Finally we have established these clusters through studying five types of data:

Concerning cooperation and communication, we have defined three categories corresponding to "scores" on the basis of several indicators. For cooperation, we have included the different forms of cooperation between festivals but also cooperative models linking festivals to other cultural, social, or artistic institutions within their territories. Likewise, for communications, we have identified a large number of possible communication modes (a festival website, a webpage translated into a foreign language, advertisements and announcements in the national or international

press, smartphone applications, etc.). A greater degree of diversity in these responses translates into a higher score.

Figure 91. Data categories for studying clusters

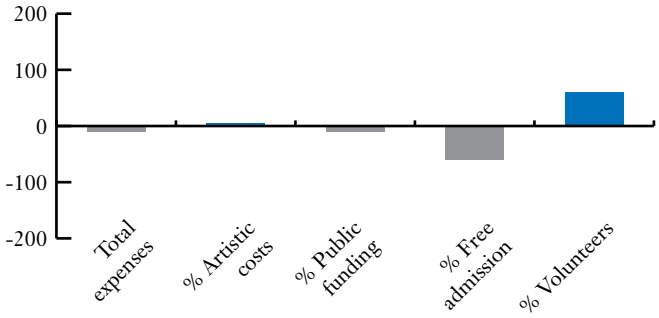
Data		%
Status	Public	15.2
	Private, for profit	14.2
	Private, not for profit	70.6
Season	October – May	28.5
	June and September	20.5
	July and August	51.0
Style	Classical	36.1
	Jazz & Blues	13.6
	MultiStyle	5.1
	Rock & Pop	26.7
	World & Trad	18.5
Cooperation	None	11
	Low	33
	Medium	48
	High	8
Communication	Low	36
	Medium	55
	High	9

This group of variables and data will allow us to distinguish between festival clusters. As we will see, the festivals in a cluster are not homogeneous. This is logical, since it is the proximity between festivals from the point of view of the variables which is key. Some clusters, by virtue of the small number of festivals they contain, show very realistic statistics, whereas others group together a large number of festivals. We will begin by looking at a large cluster.

Cluster 1. 160 festivals: the melting pot

The first cluster has many constituents. The characteristics of its constituent festivals express a fair degree of similarity with respect to most of the indicators. The figure of 478,000€, corresponding to total expenses, is lower than the overall average for all festivals, but the median budget of 270,000€ corresponds perfectly. The proportion of artistic expenses is slightly above the overall average percentage. However, the amount of public support is a little lower, as is the rate of free admissions, situated at 20% as opposed to the overall average of 35%. This is not the case for the volunteer rate, which is substantially higher for this cluster.

Figure 92a. Cluster 1



This profile shows figures close to the average only for these variables, while the differences are revealed when looking at status, musical style, time period, etc. The interesting point, however, is that it does show figures corresponding to the averages on the above criteria. The non-profit characteristic is dominant but does not characterize the entire sample, and the majority, but not all, of the festivals take place during the summer. All musical styles are represented, just as they are in the total distribution, without any one style being dominant. The levels of cooperation and communication are close to the average. The figure of 160 festivals out of 371 shows that, even if there is a high degree of festival diversity, there are nevertheless points of convergence among a good number of them, as a result of similarities in their situation. Similar, yet not identical. Indeed, as we can see in the following figure, we can find discrepancies between the average and the median for many categories of data. The average budget is twice the size of the median budget. This is a big difference, even if it is less than the one we observed for our total group of 390 festivals. Within a cluster, then, there is a limited degree of heterogeneity, but we must insist that this heterogeneity does exist.

Figure 92b. Cluster 1

Variable	Average	Median
Age	21	18
Number of concerts	37	25
Total budget	478,050	238,364
Total audience size	12,900	5,740
Number of paying customers	10,078	4,382
Ticketing	33%	30%
Seat cost	21	16
Spectator cost	49	38

Figure 92c. Cluster 1

Cluster 1. 160 festivals	%	Including but not limited to the following festivals
Classical	38	Musique sacrée Sylvanès (France), Youth Choir Basel (Switzerland), Ilmajoen musiikkijuhlat (Finland), Mechelen hoort Stemmen (Flanders), Cork International, Choral Festival (Ireland), Vilnius Festival (Lithuania), Vinterfestspill i Bergstaden (Norway), Le Festival international du Domaine Forget (Quebec), Festival Internacional de Música y Danza de Ubeda (Spain), Festspelen i Pitea (Sweden), Juillet musical d'Aulne (WBF)
Jazz & Blues	11	Jazz à Sète (France), Tampere Jazz Happening (Finland), Vossa Jazz (Norway), Festival de Jazz de Québec (Quebec), Festival de Arenys de Mar (Spain), Bangen Jazz Blues (Sweden), Festival international de jazz de Comblain-la-Tour (WBF)
Multi-Style	4	Septembre Musical de l'Orne (France), Kinsale Arts Festival (Ireland), Festival international Echternach (Luxembourg), Festival des guitares du monde en Abitibi (Quebec)
Rock & Pop	29	Artsonic (France), For Noise (Switzerland) , Provinssirock (Finland), Crammerock (Flanders), Sea Sessions (Ireland), Festival en chanson de Petite-Vallée (Quebec), Festival Faraday (Spain), Emmaboda Festivalen (Sweden), Inc'Rock BW Festival (WBF)
World & Trad	18	Africajarc (France), Reggae Geel (Flanders), Willie Clancy Festival (Ireland), Festival Mémoire et Racines (Quebec), Festival Internacional de Música de Cantonigrós (Spain), Urkult Folkfest vid Namforsen (Sweden), LaSemo (WBF)

This first cluster illustrates the existence of a model that is present everywhere, regardless of national borders, musical genre, or festival status. This model is characterized by its relative rate of artistic expenses, the extent of support by public authorities, a selective but sustained level of accessibility at times corresponding to free admissions, and considerable reliance on volunteers. The festivals concerned are most often medium-sized, different from big festival machines but nevertheless having sufficient finances for their professional activities. It is interesting to observe that this model which is the most representative for many variables – employment, artistic activity, or public funding – can include both well-endowed festivals (24 with budgets in excess of one million euros) and more financially restrained festivals (40 with budgets below 100,000€). It is remarkable that, if we take into account these budget-based sub-groupings, we continue to find variety in terms of musical style and country. The richest festivals are not necessarily rock or classical music festivals, nor are they to be found in Northern Europe or in Quebec, for example. Rather, they tend to be older festivals. A festival that has implanted itself in its territory, then, also tends to have a more ambitious cultural project and more financial resources. If we were to go deeper into the details contained in this cluster, we would see that classical music festivals tend to have the most public subsidies while rock/pop receive the fewest. These

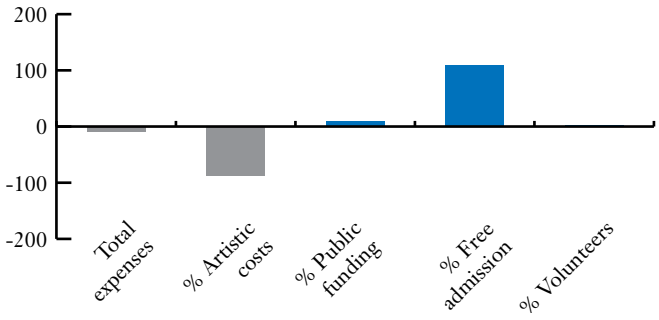
trends show how important the variable of musical genre is, but they are not strong enough to obscure the similarities between these festivals.

We can find this model in each of the countries studied to more or less the same extent, except for Spain, where it is a little less present. As it represents 43% of the entire sample, this is the model which constitutes the core of the festival landscape. It also defines a certain standard to which we can compare the other clusters which, as we shall see, display more specificity with respect to certain variables.

Cluster 2. 59 festivals: lower artistic expenses and more free admissions

This cluster has some points in common with the first: average and median budget figures are similar, and there is a strong volunteer presence as well as fairly robust public funding. However, its distinguishing features are its lower average artistic expenses and a higher rate of free admissions.

Figure 93a. Cluster 2



Once again, we can find different musical styles represented here as well as all the countries of our sample. Nevertheless, three genres do emerge more often: jazz/blues, rock/pop, and world/traditional. Classical music festivals are more infrequent. These festivals are younger than the average (17 years), attract larger audiences, and schedule a greater number of concerts. Because of their policies concerning free admissions, they cannot rely for income on high ticket sales, as these represent only 14% of the total revenue. The average seat cost (13€) is lower than the overall average, while the average spectator cost (20€) is higher. As with the previous cluster, cooperation both among festivals and with territorial partners is around the average, as is the level of communication.

Because of the rate of free admissions and of public subsidies, as well as the low level of festival-generated income, these festivals tend to be non-profit

organizations (77%). Though many of these festivals take place during the summer season, a higher-than-average number of the them (28%) take place just before or after the peak summer period, that is to say during June and September.

Figure 93b. Cluster 2

Variable	Average	Median
Age	17	16
Number of concerts	54	35
Total Budget	511,611	289,290
Total audience size	52,700	18,500
Number of paying customers	5,280	1,200
Ticketing	14%	10%
Seat cost	13€	13€
Spectator cost	20€	12€

Figure 93c. Cluster 2

Cluster 2. 59 festivals	%	Including but not limited to the following festivals
Classical	19	Festival Mille Sources & Dordogne (France), Suvisoitto (Finland), Gent Festival van Vlaanderen (Flanders), Mayo International Choral Festival (Ireland), Musikaste (Spain)
Jazz & Blues	23	Jazz sous les pommiers (France), Trondheim Jazzfestival (Norway), Festi Jazz International de Rimouski (Quebec), Festival l'Hora del Jazz (Spain), Gaume Jazz Festival (WBF)
Multi-Style	3	Musicoral (Spain)
Rock & Pop	33	The spot festival (Danemark), Art Rock (France), Seinajoen Tangomarkkinat (Finland), Rock Herk (Flanders), Jonquière en Musique (Quebec), (A)Phonica (Espagne), La Fiesta du Rock (WBF)
World & Trad	22	Les Nuits de Nacre (France), Stanser Musiktage (Switzerland), Polé Polé Gentse Feesten (Flanders), Spraoi International Street Arts Festival (Ireland), Festival international nuits d'Afrique (Quebec), Festival Internacional Do Mundo Celta De Ortigueira (Spain), Umefolk (Sweden), Barvaux city (WBF)

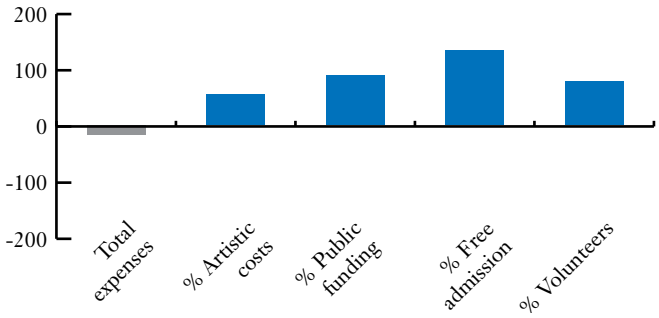
In this cluster, we can find a higher percentage of festivals from Quebec and Spain, though there is a fair degree of national diversity. The lower average figure for artistic expenses is consistent with the lower percentage of classical music festivals, since these tend to have high artistic expenses, as we saw in the chapter on festival funding. Rock, jazz, and world music concerts, however, have higher technical expenses, a trend that is reflected in the figures for this cluster. When there is a policy of free admission, there is often a high rate of

government subsidies, as is the case here. This indicates that for some public authorities, especially at the local level, free admission is seen as being consistent with their financial support, even to the point of funding entirely free festivals. This is not always true, of course, and some public bodies exclude the possibility of free festivals, either explicitly as is the case for the Wallonia-Brussels Federation, or implicitly, as is the case for France.

Cluster 3. 29 festivals: higher rates of artistic expenses, public funding, free admissions, and volunteering.

This cluster displays two similarities to the previous example: a lower average budget and a high rate of free admissions. However, the volunteer rate is above the overall average figure, as are the levels of artistic expenses and subsidies.

Figure 94a. Cluster 3



This group of festivals is slightly younger than the average for our total sample. The density of its programming is similar to the overall average, with average total audience sizes almost half as large as the overall average. The impact of free admissions policies can be found in the extent of the difference between total audience size and the number of paying customers, the latter being 7 times less. We can also observe that ticket-based income is at a very low level: 9%. In this group, we can mainly find non-profit public festivals. The level of cooperation between festivals is average, but communications levels are fairly low.

In this group, we can see an average number of classical music and jazz festivals. It is interesting to note that among the classical music festivals in this group there are more that are dedicated to experimental or contemporary music than those specializing in a repertoire or a particular heritage. Festivals like *Détours de Babel* in France, *Montréal Nouvelles Musiques* in Quebec, or Sweden's *Made* provide an illustration of this, giving free admissions policies a particular significance: they compensate for the "risks"

undertaken by audience members in attending performances of works with which they are, by definition, unfamiliar. Yet again, we can see that free admission is a policy which public sponsoring bodies feel they must offer to their audiences.

Figure 94b. Cluster 3

Variable	Average	Median
Age	20	15
Number of concerts	45	18
Total budget	310,185	90,000
Total audience size	22,242	7,600
Number of paying customers	3,888	1,000
Ticketing	9%	7%
Seat cost	11	9
Spectator cost	20	12

Figure 94c. Cluster 3

Family 3. 29 festivals	%	Including but not limited to the following festivals:
Classic	31	Les Détours de Babel (France), Montréal/Nouvelles Musiques (Quebec), Festival Ribagorza "Clásicos en la Frontera" (Spain), Made (Sweden),
Jazz & Blues	14	Sacré-blues Molson (Quebec), Festival de Blues de Barcelona (Spain), Umea Jazzfestival (Sweden), Brosella Folk and Jazz (WBF)
Multi-Style	7	Kilkenny Arts Festival (Ireland), Festival de Guitarra de Girona (Spain)
Rock & Pop	10	Genk on stage (Flanders), Festour (Spain)
World & Trad	38	Les Suds Arles (France), Carrefour mondial de l'accordéon (Quebec), Trobada de Acordeonistes del Pirineu (Spain)

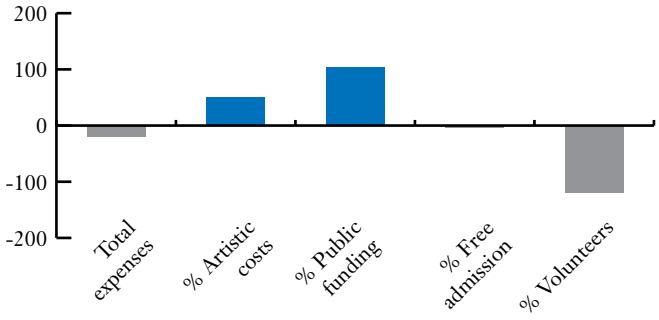
The dominant musical genres in this group (representing more than half of the festivals) are world and traditional music with all of their inherent diversity. Here we can see festivals that are oriented toward folklore (the *Pan Celtic International Festival*, for example), toward traditional music (as we can see with Quebec's *Carrefour Mondial de l'Accordéon* or Spain's*Trobada de Acordeonistes del Pirineu*) or toward the pluralism of world music (France's *les Suds d'Arles*, for example). Their common point is to be found in the large amount of public support from which they benefit as well as the large percentage of their budget dedicated to artistic expenses. This is partly connected to the timing of these festivals, mostly taking place during the fringes of the summer season (June and September). These periods are less subject to competition for artists

but are still open to large audiences. One finds more frequently a non-profit public framework as well as a certain artistic audacity that can be sustained by free admissions policies.

Cluster 4. 59 festivals: Higher artistic expenses and subsidies with less volunteer presence.

As is the case for the previous cluster, this one displays a lower average budget than the overall average, higher artistic expenses, and the same average level of public funding. What separates it radically from the previous cluster is a much lower rate of free admissions and a very restrained volunteer presence. In sum, these festivals are well recognized, dedicate a considerable proportion of their income to their artistic program, and have stable teams composed of professionals rather than ephemeral volunteer workers. Thirty-eight of them entirely exclude volunteer participation. One could suppose that, despite its common points with the previous cluster, the make-up of this group is rather unusual, and we do indeed find ourselves in a different festival landscape.

Figure 95a. Cluster 4



The festivals in this cluster are older than the average (24 years) without appearing ancient. The percentage of festivals that are directly managed by public authorities (29%) is above the overall average (15%), whereas there are only 4 private for-profit enterprises in this group. The majority of these festivals take place outside of the summer season, more than half of them being scheduled between October and May. Their programs, when measured by the number of concerts, are less dense than the average. The audience sizes are smaller than those of the previous cluster (nearly 4 times smaller than the average audience size) but the difference between this audience and the paying public is smaller (in a ratio of 1 to 2 rather than 1 to 7 as in cluster 3). This is because free admissions policies are scarce or, for 15 festivals, entirely absent. Average seat cost is low – around 13€ – bearing in mind that ticketing yields are also low. This suggests that costs related to audiences are compensated for

by public subsidies or the contributions made by patrons. On the other hand, the small average audience size means that the spectator costs (nearly 55€) are above the overall average, which is less than 42€.

Figure 95b. Cluster 4

Variable	Average	Median
Age	24	24
Number of concerts	23	20
Total budget	412,374	270,000
Total audience size	9,115	5,517
Number of paying customers	5,403	3,292
Ticketing	14%	12%
Seat cost	12.5	10.8
Spectator cost	54.7	42

Figure 95c. Cluster 4

Cluster 4. 59 festivals	%	Including but not limited to the following festivals:
Classical	63	Sinfonia en Périgord (France), March Music Days International Festival (Bulgaria), Ludwig Van Beethoven Easter Festival (Poland), Festival do Estoril (Portugal), Korsholm Music Festival (Finland), Festival de Segovia (Spain), Ostersjofestivalen (Sweden), Ars musica (WBF)
Jazz & Blues	10	Europa Jazz du Mans (France), Festival Internacional de Getxo (Spain), Nam'In'Jazz (WBF),
Multi-Style	5	Festival Internacional de Música de Cambrils (Spain)
Rock & Pop	8	Les Enchanteurs. Chansons en Pas de Calais (France), Montréal Électronique Groove (Quebec), Cap Sonic (WBF)
World & Trad	14	Babel Med Music (France), Reykjavik Arts festival (Iceland), Les Nuits du Monde (Switzerland), Flamenco Ciutat Vella (Spain), Festival d'Art de Huy (WBF)

This fourth cluster largely represents the universe of classical music, the genre of 63% of its members. These are thus the cultural events that have developed the highest degree of cooperation between festivals, as we have seen in a previous chapter, but which make far less use than others of the vast panoply of communication technologies. Quantitatively, there is less focus on developing audiences than there is on cultivating originality in terms of a musical register, a musical heritage, or a particular theme. This does not only concern the classical music festivals found in this cluster. For example, the *Babel Med* festival in Marseille (France) offers events in March that are open to the public but attract a large number of specialists and professionals. The *Festival de Segovia*, in western Spain (Castilla y

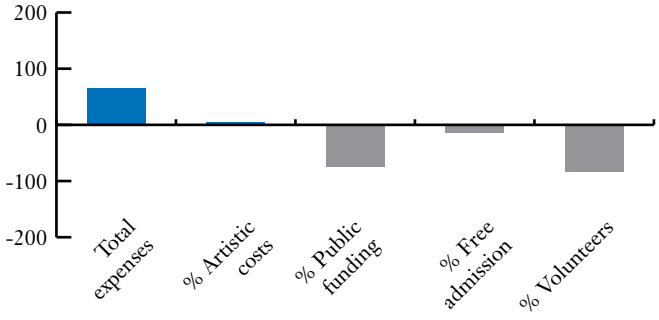
Leòn) takes place at the end of September and seeks to mix several different artistic disciplines, with music being in the service of a larger theme such as diversity.

Much like the previous cluster, this group heavily relies on public funding to maintain and develop their cultural projects. It is thus more vulnerable during periods of general budget cuts and those targeting cultural programs.

Cluster 5. 50 festivals: a larger budget but less public funding and volunteer presence

In this cluster, we find festivals with very large budgets, on average. Artistic expenses are consistent with the overall average, while public funding is more limited, as are the volunteer presence and free admissions. These festivals, the average age of which is similar to the overall average, have a high degree of activity, if we judge by the average number of scheduled concerts – 77. Their average audience size is more than twice the overall average, and the average number of paying customers, though at a lower level, is nevertheless fairly high (nearly 34,000). This is a consequence of lower rates of free admissions. The average budget of 2.2 million euros situates this group in a completely distinct universe from the previous clusters. Far more than for other groups, there is a heavy reliance on ticketing revenues: on average 42% of income is derived from ticket sales. The large audience sizes, however, mean that seat and spectator costs do not increase exponentially. If seat costs are slightly higher than the average (26€ as opposed to 19€), the average of spectator costs is lower (38€ versus 42€). These festivals often take place in the middle of the summer season.

Figure 96a. Cluster 5



Unsurprisingly, this category has the highest average number of private, for-profit organizations (32% as opposed to the average of 14%). Nevertheless, most of them cannot survive without public funding, just

like their non-profit counterparts. Only 9 festivals in the entire sample, 5 of which are in this cluster, can dispense completely with direct subsidies. From a financial point of view, then, we can see how much festivals are embedded within the world of public cultural policy, even while they develop their own individuality. This cluster distinguishes itself by the high level of cooperative practices and technologically sophisticated modes of communication.

Figure 96b. Cluster 5

Variable	Average	Median
Age	22	18
Number of concerts	77	40
Total budget	2,230,942	1,843,482
Total audience size	80,461	40,346
Number of paying customers	33,654	21,000
Ticketing	42%	39%
Seat cost	26	22
Spectator cost	38	28

Figure 96c. Cluster 5

Cluster 5. 50 festivals	%	Including but not limited to the following festivals
Classical	30	Olavsfestdagene (Norway), Naantalin musiikkijuhlat (Finland), Festival de Radio-France Montpellier (France), Festival Internacional de Santander (Spain), Festival musical de Namur (WBF)
Jazz & Blues	12	Jazz in Marciac (France), Pori Jazz Festival (Finland), Gentse Feesten (Flanders), Jazz Voyeur, Festival de Mallorca (Spain), Jazz à Liège (WBF)
Multi-Style	10	Helsinki Festival Helsingin juhlaviikot (Finland), Festival de Carcassonne (France), Mondial Loto-Québec de Laval (Quebec), Festival Castell de Peralada (Spain), Internationales Musikfestival Alpenöne (Switzerland)
Rock & Pop	38	Flow Festival (Finland), Eurockéennes de Belfort (France), Bilbao BBK Live (Spain), Francofolies de Spa (WBF)
World & Trad	10	Earagail Arts Festival (Ireland), MUD – Musiques Disperses (Spain), Ransaterstamman (Sweden), Couleur Café (WBF)

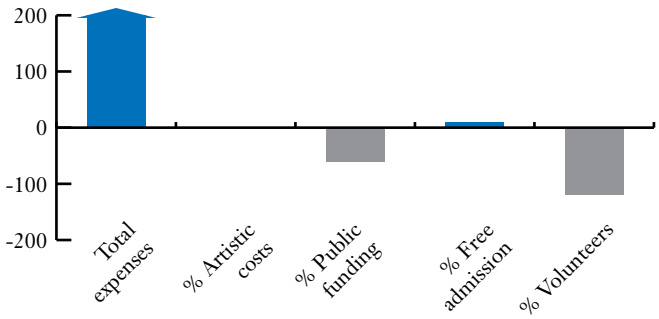
Like our first cluster, this group is not dominated by any one musical style, though many might think huge world music or rock/pop festivals would be hegemonic here. On the contrary, we can also find classical music and jazz festivals at the head of this group, with budgets largely in excess of three million euros, just as they can be found among less wealthy festivals.

As examples of the most well-endowed festivals, there are the Finish lyrical festival *Savonlinnan Oopperajuhlat*, Norway's classical music festival *Olavsfestdagene*, France's *Eurockéennes de Belfort*; the *Primavera Sound* in Barcelona, and the Walloon Dour Festival. On the other extreme can be found Majorca's *Festival International Chopin de Valldemossa* (Spain); the *Nuits d'Hiver*, a festival of improvised music in Marseille (France); the *Ransäterstämman*, a Swedish festival of traditional music, and the classical *Festival musical de Namur* in Wallonia.

Cluster 6. 4 festivals: colossal budgets, lower volunteer rates and public funding

We could have added four additional festivals to the previous cluster and thus limited ourselves to just five groups in all. However, this seemed to be unjust, even if the cluster we are now analyzing is only made up of four units. These festivals are indeed outliers whose trends have already been identified. Two of them are French, and the other two are from Quebec. In France, they are the *Festival International d'Art Lyrique* in Aix-en-Provence and *Les Nuits de Fourvière* in Lyon, while in Quebec we are concerned with the *Festival International de Jazz* in Montreal and the *Festival International d'Été* in Quebec City.

Figure 97a. Cluster 6



These festivals are radically different in nature from the others because of the size of their budgets and the extent of their activities. Financially, these are the only festivals with budgets in excess of 10 million euros, far larger than the budgets of all the other festivals. For festivals of this size, the level of artistic expenses is consistent with the overall average, which makes these festival machines powerful levers for the artists they have billed. There is a slightly lower rate of free admissions, partially due to the fact that one of the festivals, *Les Nuits de Fourvière*, does not include this ticketing policy. For *Jazz à Montréal*, as is partially the case for the *Festival International d'Été de Québec*, there are free admissions for off-site concerts, while concerts

performed in both conventional and unconventional concert halls require a paid ticket. For the *Festival International d'Art Lyrique* in Aix-en-Provence, free admission is available for the performances resulting from activities of the Academy (200 people), or of artists in residence, for rehearsals, and for a large concert in a public space. For the last case, non-paying audience members benefit throughout the year, as festival activities go on all year. In the case of Quebec, in contrast, these free events take place only during the season.

The size of the budgets and the large audiences mean that the proportion of festival-derived income in the budget is relatively high while, at the same time, the subsidies, though large in absolute terms, are lower than the average for Quebec, as we have already seen. This is also the case for the highly-reputed concerts of Aix-en-Provence and Lyon. Here, despite the legal status of the festival organizations (1 festival being public, the three others being non-profit organizations), these are veritable enterprises. As a direct consequence, the rate of volunteer workers is much lower than the average.

In terms of festival activity, this group presents an average of 147 concerts, a figure that far exceeds that of other clusters, including the previous cluster (77). As can be expected, these festivals also present significant departures from the norm in terms of audience size. When these festivals take into account the entire program (including free concerts), they reach an average of nearly 800,000 audience members. It is the significant proportion of free concerts which explain why ticketing revenues are not as high as we might have expected. These revenues, though higher than the average (26%), are less than those for the previous cluster (42%). Given these numbers, spectator and seat costs are extremely varied. The prices posted for lyrical festivals and the absence or profusion of free concerts create vast differences between these festivals. Likewise, the averages and medians we can find in this cluster are very artificial. However, all four find a commonality in their intensive use of communication tools and their high level of cooperative practices with local authorities and with other festivals.

Three out of the four festivals have very broad programs, both in terms of music and other artistic disciplines (dance, street art, theatre, etc.). This is less true of the fourth festival (Aix-en-Provence), though one can find choreographed performances and even, when surveying its long history, more popular vocal repertories.

We can find another distinctive feature with festival age: an average of over 50 years! This indicates a deep symbolic and material entrenchment in the

festival territory. Some of the patronage and sponsoring, especially on a local level, can be explained through this entrenchment.

Figure 97b. Cluster 6

Variable	Average	Median
Age	51	54
Number of concerts	147	147
Total budget	15,852,233	16,868,232
Total audience size	792,573	616,704
Number of paying customers	87,356	94,907
Ticketing	34%	33%
Seat cost	60	46
Spectator cost	91	44

Figure 97c. Cluster 6

Family 6. 4 festivals		
Classical	1	Festival international d'art lyrique Aix-en-Provence (France)
Jazz & Blues	1	Jazz à Montréal (Quebec)
Rock & Pop	2	Festival International d'Été de Québec (Quebec); Nuits de Fourvière (France)

We have seen a sort of melting pot with our first cluster of 160 festivals, illustrating a zone of convergence for festivals on an international scale. Here we are confronted with an exception. It does, however, express a reality that can be found in the festival landscape. This trend toward the coexistence of a large central group and exceptional festival "machines" can be generalized, even if it does not always have the same amplitude that can be found in this last cluster. This can be observed in Norway with its "meeting point" festivals (*knutepunkt*), playing the role of a big brother within a sector or a territory. In Spain, France, and Quebec, big festivals (the *Sonar*, the *Francofolies*, the *Folle Journée*) are reproduced in other metropolitan areas and countries and are the international leaders of music transmission in their countries. We can compare them with other large music events which, though not of the same dimensions as these festivals, are nevertheless also leaders in their sector. These can be found in all musical styles. For classical music, events like Grenada's festival in Spain, the *Gent Festival van Vlaanderen* in Flanders, or the *Festspilene i Nor Norge* in Norway take on this role. For jazz, we can cite *Jazz in Marciac* (France) and the *Pori Jazz Festival* (Finland) as examples. For rock, there are the *Eurockéennes de Belfort* (France), the *Primavera Sound* in Barcelona, and the *Dour Festival*

(WBF). In terms of world music, we can think of *Couleur Café* (WBF) or *Culturescapes* (Switzerland).

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What can be learned from this analysis based on festival clusters? First, it allows us to group together a number of the conclusions we have already drawn throughout the first part of this work. The world of music festivals is enormously diverse and, at times, seems to defy classification. These differences can, of course, be seen in levels of funding, in how these funds are invested, and in their institutional origins. They also concern how festivals implant themselves in their territory and how this is affected by their age, their length, and the partnerships they develop in their cultural and political environment. The number of jobs they generate also varies, especially in terms of volunteer presence. We could easily continue citing examples to convince us that the excessively fragmented festival landscape does, in fact, render it inaccessible to scientific analysis, at least in terms of a holistic quantitative approach.

However, the creation of clusters does provide a second lesson that, to some extent, contradicts this point of view. Beyond their inherent diversity, festivals do present certain commonalities. The existence of a sizeable central group which displays relatively average values is enough to convince us that there is a certain convergence around the variables which we have studied. The first of these is the structural importance of public funding, regardless of musical style, budget size, legal status, or country. The second is the size of artistic expenses that systematically weigh on the budget. With a few variations to be found according to the type of event, these expenses are always high, a fact that leads us to conclude that festivals are now major employers in the artistic field. The third concerns employment in the field of culture. The use of volunteers cannot be found systematically, even if it is used extensively in an overwhelming majority of festivals. That said, the other major aspect here is the temporary nature of festival activity, regardless of the level of professional involvement. Despite trends showing that festivals implant themselves in their locale or that they take on missions exceeding their season dates, the majority of festivals can be characterized by an oscillation between periods of intense activity and other periods with a skeleton staff. This engenders a particular management style. It is also consistent with a concept of employment that is characteristic of today's economies, one requiring a great deal of flexibility on the part of employees and creating a certain amount of job insecurity forcing many workers to take on more than one job.

The third lesson, as we have already suggested, involves how festival space is structured. In our clusters, we have been unable to find any features that are exclusive to particular nations, musical styles, or funding levels. Each cluster manifests a certain degree of diversity with regard to these three points. This means that the largest points of similarity are inherent to each cluster, though they do leave room for other combinations. On some aspects, like funding levels, we can clearly see the influence of the national variable. On the one hand, there is Quebec with high funding levels, while Spain has many small festivals. On other points, we can observe the influence of musical genre: the level of artistic expenses, technical expenses, or volunteer presence.

Finally, in this part of our work, we have used indicators that raise interesting topics for discussions from both cultural and political points of view. Thus, when considering the level of artistic expenses, one might conclude that the higher the expenses, the higher the artistic quality, but this is open for discussion. It could suggest exactly the opposite, as might also be the case for an excessive reliance on big-name acts. Free admissions give rise to similar debates concerning cultural accessibility, while public funding brings up other controversies, depending on the national context. It is this issue of national contexts that we will now pursue, while following the web of convergences and divergences that festivals seem to have spun.

Part 2
Festivals and Territories

In the first part of our study, we were often skeptical of the impact national variables can have on larger trends in the festival landscape, whether these concern the goals pursued by festivals, their human or financial resources, or their communication and cooperative strategies. This skepticism has two main sources. The first is scientific in nature: the diversity in our sample limits our ability to generalize on the basis of a limited number of observations. The second reason is linked to our methodological approach. Indeed, we believe that the points of convergence and divergence for festivals are more closely associated with their artistic affinities or their programming choices than with their national identity.

Nevertheless, we will grant this variable its rightful place in our introduction to the following monographs on specific national festival landscapes. This might appear to be contradictory, but this is merely the result of a paradox. On the one hand, we esteem that similarities between festivals are more associated with programming choices than geographical proximity. On the other hand, we have also seen the recurring importance of public support, regardless of national context. This being said, each country displays wide differences in terms of how government is divided into territorial levels, the role played by the central government, and the degree to which historical heritage can influence future developments. The paradox, then, can be described as follows: the objects of our study – festivals – are strongly influenced by their national context, especially in terms of their financial resources, but they also display points of convergence in terms of their expenses and programming choices. This is what we chose to symbolize earlier in this work with the phrase "national input/artistic output".

Even if these festivals do show resemblances from one country to another, they are also situated within frameworks that exert an influence on a series of domains. We will briefly expose these here since they will be developed in more detail in the pages to follow. First, there is the question of how much recognition different national cultural policies have accorded to festivals. We will see that there are interesting national contrasts with regard to how festivals were created and how the state considers them today. There is also the question of how they are supported by different governmental levels. By support, we are referring to both financial aid and the philosophy implicit in the state's criteria for allocating this aid. Third, we will take into account how more recent trends, especially the current budgetary crisis, contribute to restructuring this musically diverse sector and its various artistic and economic models. With these and other points in mind, we will thus be able to specify the irreducible national differences within the festival landscape.

In debarking on this comparative national approach, which we will attempt to synthesize in our conclusion, we are convinced that it will give us an image of the contemporary festival landscape from a different point of view. This image is useful because of how it will complement our quantitative analysis. Indeed, only a monographic approach will allow us to study concrete illustrations of the general facts we remarked upon in the first part of this work. Similarly, it will allow us to nuance our explanations of these phenomena. We have also decided to extend our scope beyond the countries making up the quantitative sample group. Thus, there will be three additional countries analyzed in this part, all studied by the most well established specialists of cultural policy and, particularly, festivals. Hungary, which was originally associated with our research, was unfortunately unable to finalize its quantitative data. However, János Zoltán Szabó's article will include the insights he published in a very recent thesis on this subject. He will be shedding light on the festival landscape in his country and the dynamics in Eastern Europe, which our study had been lacking. The contributions of Luca Dal Pozzolo and Luisella Carnelli will clarify Italian festivals on two levels: the national level and the level of a particular region, the Piedmont. Finally, the inclusion of Great Britain in this second part will allow us to study a country that is representative of a particular type of cultural policies and thus a specific way of understanding festivals. In his work on Great Britain, Christopher Maughan is particularly attuned to comparative analysis as he directs a comparative project which will soon be published in homage to our colleague Dragan Klaic, who left us all too early in 2011.

In this monographic framework, we have not wanted to insist on a single, restrictive analytical method. Instead, we considered that the different possible specificities linked to national context would be better understood if we

left a large degree of liberty to our participating authors and their various personal approaches. Nevertheless, we have asked the researchers to orient their study along three broad axes: how festivals emerge and are consolidated in their country, the financial aid policies set into place, and the challenges festivals face today in an economic context strongly marked by the global crisis in public funding.

Music Festivals in Belgium: The Wallonia-Brussels Federation and Flanders

Michel Guérin
Béatrice Reynaerts & Isabelle Paindavoine

Introduction

With the exception of the present work, there have not been specific studies conducted on musical festivals as a whole in either Flanders or the Wallonia-Brussels Federation (WBF). Of course, there are many monographs studying particular festivals (Dado 1997; De Leeuw et al. 2010; Lebrun et al. 2011; Martin 2009; Radelet 2008) or more general works on musical genres (classical music, rock, jazz, etc.) in which festivals are sometimes studied without being the main emphasis. *Festudy* would thus appear to be the first step in this direction and, it must be emphasized, it represents a study covering the whole of Belgium. Indeed, Jan Briers (Jr.), then representing the *Festival van Vlaanderen* in the *Festudy* group, requested that the Observatory of Cultural Policies in the WBF add data from Flemish festivals to this study.[1]

In this "Belgian" chapter, we will first sketch a brief historical account of the festival, and then, following the progressive federalization of the country, we will distinguish between the Flemish and Francophone regions by highlighting the specific aspects of their respective cultural policies. Although we will at times make comparisons when the data permits us to do so, we will be cautious in making generalizations given the variable size and composition of the festivals in our sample. Nevertheless, this approach will remain synthetic in nature, reserving many of the details for future publication.

This study provides important elements for understanding the diversity of festival dynamics in the north and south of the country. This diversity is influenced by key indicators (funding, audience size, etc.) but also reveals other trends that are common to both parts of the country as well as to the entirety of the Festudy sample.

An historical overview

As is the case in other countries, Belgium's first festivals were devoted to classical music and emerged after the proclamation of independence, first in Brussels (1834) and then in other cities like Liège, Leuven, Ghent, Bruges, and Mons. These festivals, organized by musical societies and vocal or instrumental ensembles, brought together several hundred professional and amateur artists but were not yet permanent in nature (Gregoir 1874).

1. See the general introduction to the present work.

In 1867, following the model set forth by large German festivals, the government allocated its first subsidy for the creation of a federation of the musical societies of Belgium.[2] A classical music festival was created in Brussels in 1869 during the inauguration of the train station the *Gare du Midi*. Thirteen hundred choristers and 150 musicians performed before 8000 audience members (Wangermée, Mercier 1982). At this time, tensions had already started to appear between amateur musical societies and conservatories (CSMB 1874). The former conceived of festivals as national and popular in character, while the latter believed that only professional musicians were capable of establishing festivals as permanent events and of ensuring their continuance. We must qualify what musical societies meant by "popular." In this period, this meant recognizing and enlarging the participation of the nascent bourgeoisie in a discipline that was still reserved for the aristocracy. The cities of Antwerp, Liège, and Brussels were linked with this development, which radiated outward from these hubs.

In Belgium during the first part of the 20th century, we can mostly see the emergence of commemorative festivals dedicated to specific composers. For example, Liège welcomed the 8th annual festival of the *International Society for Contemporary Music*, while the *Société "Kursaal Ostende"* organized a two-day festival in the summer of 1933. From 1940 to 1944, the employees at the Mint organized festivals in Brussels featuring operettas.

Following a broader European trend, it was especially during the latter half of the 20th century that a second generation of classical music festivals came into being, many of which are still in existence. Indeed, some can be found in our sample. This took place just prior to a broad public movement demanding wider access to cultural events and was equally linked to government decentralization projects. Thus, in 1957, many festivals were created in the south of the country in the cities of Liège, Stavelot, Saint-Hubert, and Chimay, while in the North, there were the festivals of Ghent, Antwerp, Bruges, and Tongeren.

In Flanders, the leadership of Jan Briers (Sr) led to the creation of a series of concerts in Ghent in 1958 and the first consolidation of festivals. This *Festival van Vlaanderen* was created in the wake of the Exposition Universelle of Brussels, and the concerts that had already been organized in different Flemish towns joined this initiative. Today, it includes eight different autonomous sections: Antwerp, Bruges, Brussels, Ghent, Kortrijk, Leuven, Mechelen, and Tongeren.

In 1964, the first international festival of modern music was established in Brussels, the biennial *Reconnaissance des musiques modernes*, organized by Radio

2. http://www.numisbel.be/Medailles_historiques_A.pdf p. 24.

Télévision Belge under the aegis of Robert Wangermée. In order to promote the composition of new Belgian musical works, another festival was created in 1967, the *Biennale de musique belge*. The current festival *Ars Musica* took over the reins of this initiative in 1989 (Dufour 2004).

In the French-speaking part of the country, classical musical festivals came together in 1971 under the banner of the *Festival de Wallonie* with the goal of mutually reinforcing one another (Muylle 2003). Already in 1976, Pierre Wigny, then minister of justice and French culture, had remarked upon the dispersion of classical music festivals and their lack of recognition abroad. Following the festival consolidation in Flanders in 1958, he advocated measures which would place festivals in a synergetic relationship with one another, leading to better management and higher artistic standards. At the same time, he encouraged other governmental levels (the provinces and communes) to support these events (Wigny 1968).[1] Today, the *Festival de Wallonie* is structured like its Flemish counterpart. It is made up of the seven independent festivals in Wallonia and Brussels that constitute a federation.

For non-classical music, jazz festivals were the first to appear, a development taking place throughout the 1950s and 1960s. Examples of these can be found in Comblain-la-Tour (1959), Kortrijk (1963), the *Jazz Bilzen* (1965) in the province of Limburg, followed by *Jazz Middelheim* (1969) in Antwerp.

The *Festival de Châtelet* (1961) and the *Festival de la Guitare d'Or à Ciney* (1962) inaugurated the Yé-yé era of music, but it was the festival of Châtelet that rapidly became the first pop festival in 1965. More than 30,000 young people from Belgium, France, England, and Germany came together to welcome *The Animals*, the English rock group just behind *The Rolling Stones* in terms of popularity. In a fair number of industrialized countries, the 1960s danced to the rhythm of a younger generation who broke away from their elders and used rock music to challenge the Establishment. After the festivals of Woodstock in the USA and the Isle of Wight in England, concerts and festivals followed in rapid succession in all countries (the *Rac Pop Festival* in Brussels, the *Pop Event* in Deurne, etc.). Indeed, it was Amougies, in Belgium, that welcomed the "hippy" festival of 1969 that had been forbidden in Paris, a festival which will remain in the annals of the great European rock events of this era.[2]

1. Pierre Wigny, Culture Minister from 1966 to 1968, initiated the five-year plan for cultural policy that carries his name and progressively set into place (from 1968 to 1975) a Francophone network of maisons de la Culture, centres culturels, and maisons de jeunes.

2. http://www.memoire60-70.be/Chronique_1966_1972/Amougies_Festival_Actuel.htm.

In the 1970s, a new wave of modern music festivals was launched, first in favor of rock with the *Torhout Werchter* (1975) but also world music with its earliest festivals like the *Sfinks festival* near Antwerp or the jazz-based *Gouvy festival* in 1978. This movement, favorable to the creation of festivals, continued throughout the following decades, both in the north and the south of the country. Festivals, once 'exceptional' and national phenomena with international programs and highly diverse audiences, became commonplace events with a plethora of objectives. They are now a means by which cities seek to distinguish themselves and to boost their local economies. Today, we can find more than 250 festivals in Flanders and nearly 180 in the Wallonia-Brussels Federation. They are of all shapes and sizes, as we shall see shortly, and differentiate themselves from their predecessors by an identity rooted in the local environment. We will observe that this local element has cultural, educational, and artistic dimensions, and it is liked to socio-economic and tourism concerns.

Cultural administration by the Communities

The first reforms of the Belgian state were undertaken at the end of the 1960s, progressively creating the federal government. The revision of the Belgian Constitution established the principle of cultural autonomy and, in 1970, culminated in the creation of the cultural communities. Three administrative bodies with the power to legislate over cultural affairs were recognized: the French, Flemish, and German cultural communities. In August 1993, the national government was transformed into a federal state. The French, Flemish, and German communities were granted a legal status, as was also the case for the Walloon and Flemish regions. These became autonomous in the legislative, executive, and administrative spheres. In the bilingual Brussels-Capital Region, cultural affairs are administered by the French Community Commission (*Commission communautaire française*) for Francophones and the Flemish Community Commission (*Vlaamse Gemeenschapscommissie*) for Dutch speakers. "Bi-cultural" institutions remain under federal authority. In terms of public policy, the primary responsibility for the management of cultural policies is on the national level (the national post of culture minister was created in 1958), while each linguistic sphere possesses its own culture minister.

The federal level has nevertheless retained its grasp on some powers and cultural institutions. It can intervene in cultural policies touching upon initiatives, cultural transmission, and heritage through its management of bi-communal institutions (both Francophone and Flemish), principally established in the Brussels Region (Guérin 2011). The Federal state has also assumed an economic role in cultural policies, particularly through providing tax exemptions for gifts or donations to cultural institutions. It also addresses questions

concerning the social, fiscal, and juridical status of artists; copyright; and employment both in general and in the cultural sectors.

The Wallonia-Brussels Federation

From 1980 to 2000, new initiatives were generalized throughout the cities and communes of Belgium. Faced with the growing importance of festivals in the spread and circulation of artists and modern music during this period, the French Community Commission has privileged the development of local spaces, supporting festivals and concert organizers who promote or showcase young artists. In 1992, concert organizers created *Court-Circuit*[1], an association working to structure the modern music sector and promote artists. With objectives of social and economic development, this association provides a network of information and advice as well as encouraging exchanges on both a promotional and practical level (i.e. information concerning legal status, administrative processes, or technical challenges). It organizes many projects for young groups or artists and provides a link to various venues and concert organizers. Supported by public funding, this association created the *Circuit des Festivals* in 2009, which brings together artistically independent festivals that are concerned with the well-being of their audiences and artists as well as the economic and environmental impact they can have on the region.

In 1999, festivals were truly defined as an important field for music-related policies (Larue 1999). The French Community was very explicit in its reasons for supporting certain internationally-recognized festivals: financial aid would help them continue to take risks in creating their program and in signing on young artists. Today, financial support for festivals consists in subsidies that cover the artistic fees for musicians likely to develop a professional career. This support can be allotted over the course of several years (a four-year agreement or a five-year contract), which guarantees longer-term financial assistance, or it can be provided on a more limited basis. In addition to these subsidies, *Wallonie-Bruxelles International* can provide financial help for the artistic fees required by foreign artists.

For classical music, certain criteria must be satisfied in order to receive this subsidy, its main goal being to promote professional musicians. Specifically, these criteria include the artistic integrity of the festival project, the artist fees involved (a minimum sum being imposed), the contribution the festival makes to the prestige of the Wallonia-Brussels Federation, and its respect of social legislation. Charitable concerts and festivals are not eligible for this financial support. Festivals must schedule a minimum of four concerts, at least one-third of which must be performed by artists from within the WBF.

1. http://www.court-circuit.be et www.circuitdesfestivals.be.

Additionally, the *Conseil de la musique classique* monitors the balance between artists from the WBF and from the exterior as well as the number of established musicians in relation to newer artists. It also looks at the administrative structure of a festival as well as the balance between of festival-derived income (ticketing, beverage sales, etc.), sponsorship, and public subsidies. It pays close attention to how well both artists and audience members are received by the festival team.

The criteria for financial support differ when we enter the sphere of modern music. Besides the main objective of promoting professional musicians, artistic quality, and the prestige of the WBF, the festival must organize a minimum of 7 concerts with one-third of the musicians coming from the WBF. The festival must also be at least three years old and cannot be entirely free. The global budget must be of at least 20,000 euros, with a fixed minimum for artistic fees. Just as with classical music, close attention is paid to how audiences are accommodated by the festival as well as to health and safety concerns.

As we will see in figure 4, other governmental levels (regions, provinces, cities, and local bodies) can support festivals, though generally to a lesser degree.

The Flemish Community

From the 1980s onward, all of Flanders has experienced the same growth in modern music festivals. In 2003, festival organizers came together to create the *Fédération des Festivals de musiques en Flandre* (FMiV)[2] in order defend the interests of organizers active in this sector. It provides an arena for expressing and debating different points of view on important issues like cultural policy, artistic status, copyright, infrastructure, festival-based income, social security, labor relations, safety, and NPO legislation, among others. This association promotes exchanges on different artistic issues as well as cooperation among its members or with other Belgian or foreign festivals. It also occasionally conducts studies in order to strengthen the credibility of festivals with governmental bodies, sponsors, and the public.

In 2010, with financial backing from the *Federal Public Service for Sustainable Development*, the Francophone association *Court-Circuit* and the Flemish federation of festivals launched a training program on sustainable development strategies for festivals, both cooperatively and in each Community. Besides waste management and energy conservation strategies, it also addressed themes such as sustainable agriculture and how to strengthen the local economy. This financial aid policy is situated within a larger framework of environmentally responsible festival practices.

2. www.fmiv.be/wie-zijn-wij/.

The decree "Kunstendecreet 2004" organized the system of festival subsidies. Open to all forms of art (performing arts, music, visual arts, audio-visual works, *belles lettres*, architecture, etc.) and any combination thereof, it proposes a global approach to all artistic disciplines. Subsidies can be attributed for a specific project or can consist in a block grant covering the operating costs for a two- or four-year period.

In order to receive a block grant, festival organizers must provide precise details on the nature of their project, its artistic merits and general quality, its viability, and its long-term potential. They must also show the extent of its national and/or international prestige, situate it in a partnership or a network involving other actors (in the artistic sphere or elsewhere, within the country or abroad), and demonstrate its intercultural dimension in terms of programming choices, audience diversity, human resources, and management. The amenities it offers to audience members and its solid finances are also decisive factors for receiving a subsidy.

In 2006, new criteria were added, requiring festival organizers to specify their provisional development plans and the financial transparency of their artistic policies. The relationship between the festival and its environment also have to be explained, particularly in terms of the value a festival adds to a region through its program and its contribution to other regional initiatives. There is additional weight placed on the social dimension, with an emphasis on initiatives targeting selected demographic groups. Finally, the criterion addressing managerial efficiency and leadership has been reaffirmed, with cooperation between artistic and non-artistic actors being stressed. This is for reasons of financial expediency, with a view to optimizing how the available infrastructure and operational resources are used as well as the allocation of funds for the creation of new artistic works.

As is the case with the WBF, festival organizers also receive financial aid from other sources, including local and provincial authorities as well as other ministries of the Flemish Community.

Festudy in the WBF and Flanders: General characteristics of the sample

As a brief reminder, we did not require the composition of our sample to be representative of all festivals because in Belgium, as elsewhere, it is extremely difficult to quantify them[1]. This sampling testifies to the diversity of genre and size of festivals, whether they receive public funding or not.

1. The criteria used to select festivals for our sample were the following: maximizing the diversity of musical genres and requiring a minimum of 7 concerts, 3 years minimum of existence, and a minimum length of 2 days.

In figure 1, classical music is the dominant category for the 18 Flemish festivals in our sample. This makes it the dominant category (representing 39% of the sample), consistent with Europe as a whole. It is followed by world/traditional music (28%), rock/pop (22%), and jazz/blues (11%). In the Wallonia-Brussels Federation, the sample cleaves closely to a realistic distribution of festivals by musical genre in the Federation. Out of 52 festivals, rock/pop dominates (46%), followed by classical music (21%), world/traditional (15%), jazz/blues (15%), and the sole multi-style festival in the Belgian sample.

Figure 1. Flanders and WBF sample by musical genre

	Flanders		WBF		Festudy	
	No.	%	No.	%	No.	%
Classical	7	**39**	11	**21**	141	**36**
Jazz-Blues	2	**11**	8	**15**	53	**14**
MultiStyle	0	**0**	1	**2**	20	**5**
Rock-Pop	4	**22**	24	**46**	104	**27**
World-Trad	5	**28**	8	**15**	72	**18**
Total	**18**	**100**	**52**	**100**	**390**	**100**

Taken as a whole, these 70 festivals represent 18% of the total Festudy sample. The majority of them (84%) are NPOs, 12% are public, and 4% are for-profit. Nearly half of them (49%) are urban festivals, while 30% take place in a rural environment. The remaining 21% are situated in semi-rural, semi-urban spaces. In terms of musical genre, classical music is dominantly urban (61%), as is the case for jazz/blues (50%). Rock/pop is fairly evenly distributed between urban (43%) and rural (46%). Likewise, world/traditional is 46% rural and 38% urban.

Following trends in the global sample, the festival age is closely associated with musical style. Thus, 61% of classical music festivals are more than 30 years old (Liège, Stavelot, Saint-Hubert, 54 years old, and the Ghent *Festival van Vlaanderen*, 53 years; the youngest festival is the *KlaraFestival*, Brussels, 7 years old), while 50% of rock festivals are less than 10 years old. Only 4% of rock festivals have garnered experience of 30 years or more (*Cactus Festival*, Flanders, 30 years). A majority of jazz/blues festivals are between 10 and 20 years old (50%), with 30% of these festivals exceeding 30 years (*Gouvy Jazz*, Wallonia, 34 years). World/traditional music festivals are on the younger side, 31% of them with fewer than 10 years experience (*LaSemo*, Wallonia, 4 years) and the rest are evenly distributed throughout

the other age brackets. The oldest is the *Dranouter Festival* (Flanders, 36 years.)

Half of these festivals (50%) take place in July and August, 21% in June or September, and the remaining 29% between October and May. This distribution corresponds to the general pattern in the Festudy sample. In terms of musical genre, 77% of world music festivals take place in July and August, with 15% occurring during the fringes of the summer season (June and September). Thus, the vast majority of these festivals take place during the summer. Jazz/blues is also marked by the high percentage of July and August festivals (60%), with the remaining festivals (40%) taking place between October and May. Nearly half of rock/pop events (43%) are scheduled for July and August, and when we add the June/September festivals (32%), we can see that three-quarters occur during the summer season. The remaining 25% are situated between October and May. Finally, classical music festivals are scheduled just as often for July and August (39%) as they are for the October-May period (39%), the remaining 22% taking place in June or September.

If we look at the length of the festival program, half of the festivals (49%) are concentrated into four days, a situation which most strongly characterizes rock (68%), world music (62%), and jazz (60%). At the other extreme, 56% of classical music festivals cover between 8 and 14 days, with another 39% exceeding 15 days (42 days for the *Festival Midis-Minimes* in Brussels, and 30 days for the *Festival van Vlaanderen* in the province of Vlaams-Brabant).

Festival funding

Figure 2 presents the how financial support from the different communities has evolved over a three-year period. It first shows funding differences between Flemish and WBF festivals (a difference in excess of 500,000€), but we can also see an important difference between the global budgets in the cultural sector. The main difference is especially to be found in how this funding is distributed. On the one hand, the WBF more heavily supports modern music festivals, as opposed to Flanders, which provides more support to classical music festivals. On the other hand, there is also an important difference in the number of festivals receiving financial aid since, in 2012, 74 festivals received subsidies in the WBF (57 in modern music and 17 in classical music), while only 22 festivals received funding in Flanders (11 in modern music and 11 in classical music).

When looking at these subsidies as a whole, regardless of the kind of financial aid granted (on an annual or multi-year basis), the average subsidy in Flanders amounts to 124,962€ per festival and in the WBF, 29,899€. These choices are clearly related to different funding strategies: in Flanders, funding is higher but more selective, whereas in the WBF, it is wider but less intensive.

Figure 2. Change in financial support in euros for festivals (2010 – 2012) in Flanders[1] and the WBF (AGC 2013)

WBF	Total cultural budget (excluding audio-visual)	Theater Arts	Classical music festivals	No.	Non-classical music festivals	No.	Total festivals
2010	273,723,000	84,605,000	892,100	18	1,225,037	52	2,117,137
2011	281,885,000	87,991,000	931,400	16	1,217,129	53	2,148,529
2012	291,000,000	91,654,000	959,600	17	1,252,930	57	2,212,530
Flanders	**Total cultural budget[2]**	**Art[3]**					
2010	453,943,000	141,215,105	1,926,825	9	880,644	14	2,807,470
2011	449,485,000	143,891,904	1,893,510	9	843,354	12	2,736,864
2012	439,870,000	150,145,221	1,973,952	11	775,230	11	2,749,182

To conclude our discussion on public funding, figure 3 shows the percentage of subsidies relative to the total festival income. The average is situated at 37% in the WBF and 29% in Flanders. If we take the ratio of the total amount of public subsidies to the total income, the same figure for the Festudy sample is situated at 32%. However, if we take the average of the percentages festival by festival, we obtain an average of 45% subsidy levels in the Festudy sample, situating the two Communities below the European average.

Figure 3. Public funding as a percentage of total budget by level of government[4]

Average percentage (median)	Flanders	WBF
Local subsidies	9% (3%)	7% (2%)
Provincial subsidies	4% (0%)	4% (2%)
Regional subsidies	2% (0%)	7% (3%)
Community subsidies	13% (1%)	18% (9%)
Federal subsidies	0% (0%)	0% (0%)
EU subsidies	0% (0%)	1% (0%)
Total subsidies	**28% (18%)**	**37% (32%)**

1. We would like to thank Gert Van Tittelboom, Flemish Community, Department of Culture, Youth, Sports and Media as well as Tim Lodens and Dominique Van Gansbeke, Flemish Community, Arts and Cultural Heritage, for their kindness in providing this information.
2. http://www4dar.vlaanderen.be/sites/svr/cijfers/Exceltabellen/cultuur/algemeen/CULTALGENIEUW4.xls.
3. Budget of the Agence des Arts excluding cultural heritage – http://2012.kunstenenerfgoedjaarverslag.be/kerncijfers.
4. This is calculated by considering separately the subsidies for each governmental level per festival.

It must be remembered that not all festivals in our sample benefit from public funding and that they are not all financed in the same way. This explains gaps between the average and median that are sometimes very wide. Some festivals benefit from local, provincial, or Community support while others do not.

The amount of these public subsidies varies by musical genre. Thus, when we compare classical music and rock within the two communities, Flanders provides a larger degree of financial support for classical music festivals (43% of these events derive more than 50% of their income from subsidies, and 14% receive more than 75% from subsidies) while 75% of rock/pop festivals derive less than 25% of their budgets from public funding. In the Wallonia-Brussels Federation, 36% of classical music festivals receive between 50% and 75% of their income from subsidies, and 67% of rock/pop concerts derive less than 25% of their budget from public sources.

There are also wide differences in the overall budgets of these festivals since the majority of Flemish festivals, with the exception of a few classical music festivals, have budgets in excess of 400,000€ while in the WBF the majority are situated below 400,000€. In the WBF, only 4 rock/pop festivals and 2 world/traditional festivals have budgets over 900,000€.

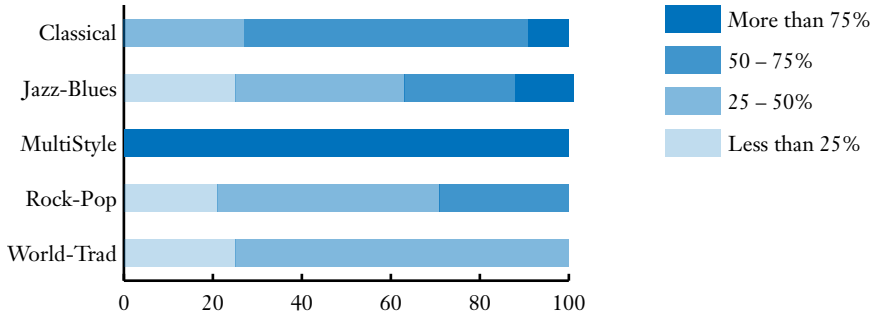
Figure 4. Distribution of festival budget sizes (€) by musical genre – Flanders and the WBF

	Less than 80K		From 80K to 200K		From 200K to 400K		From 400K to 900K		Greater than 900K	
	WBF	Flanders	WBF	Flanders	WBF	Flanders	WBF	Flanders	WBF	Flanders
Classical	18	0	64	29	9	29	9	14	0	29
Jazz-Blues	25	0	38	0	38	0	0	50	0	50
MultiStyle	100	0	0	0	0	0	0	0	0	0
Rock-Pop	33	0	21	0	25	0	4	75	17	25
World-Trad	50	0	0	0	13	0	13	40	25	60

Given that in each community priority is given to the artistic dimension, the figures below show the proportion of artistic expenses[1] to global budget by musical genre. In the WBF, 64% of classical music festivals invest between 50% and 70% of their budget, while 9% invest more than 75% of their total budget. In rock/pop, 75% of the festivals invest between 25 and 50% of their total funds. Jazz/blues festivals invest 38% of their budget, and 75% of world/traditional music festivals invest between 25% and 50% of their budget. Multi-style festivals, on the other hand, invest more than 75% of their budget in artistic expenses.

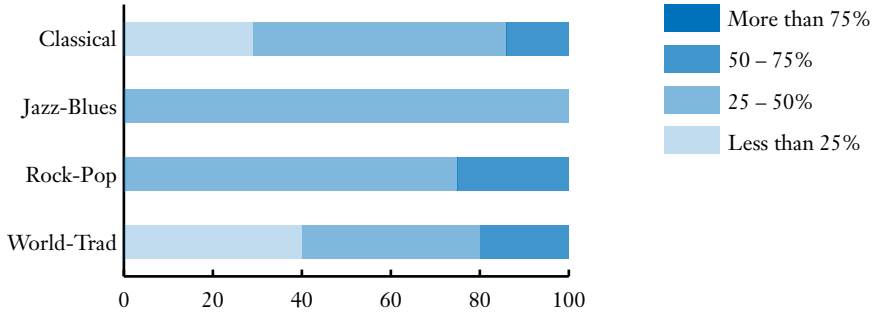
1. By artistic expenses, we mean the fees paid to artists and the expenses associated with welcoming them and providing for their stay.

Figure 5. Artistic expenses in 2011 by musical genre, in the WBF



In Flanders, 57% of classical music festivals invest between 25% and 50% of their budgets, while 14% invest between 50% and 75%. The 25-50% bracket represents 100% of jazz festivals, 75% of rock/pop festivals, and 40% of world/traditional music festivals. For the latter genre, 40% of the festivals invest less than 25% of their budget.

Figure 6. Artistic expenses in 2011 by musical genre, in Flanders



Audiences: Size and origin

When compared with European averages, changes in festival audience size between 2008 and 2011 show a large proportion of small festivals in the Wallonia-Brussels Federation (46% had fewer than 3,000 audience members in 2011) while 8% of the festivals have more than 80,000 participants. Flanders shows the opposite trend with 35% of its festivals having more than 20,000 audience members and 29% with more than 80,000 participants.

In the WBF, festival audience size grew by 10% between 2008 and 2011, with an average of 22,291 participants in 2011, but shows a decrease of 19% in 2012. In Flanders, average audience size is higher, with an average of 46,756 participants per festival. This audience size continued to show growth in 2011 with an increase of 7% (50,212 participants) but decreased sharply in 2012

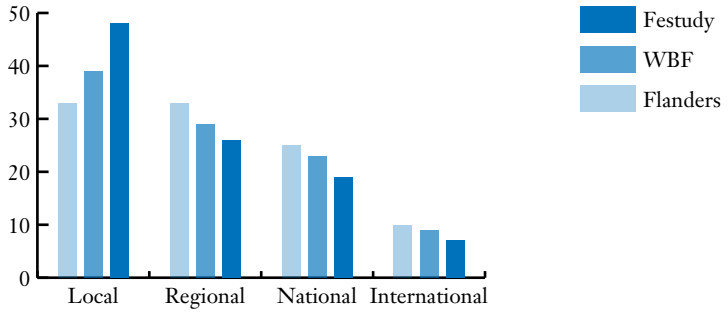
(31,528 audience members). If we now consider the median audience size (a more representative figure), we can see constant growth in audience size for the WBF (3,700 in 2008, 4,541 in 2011, and 5,000 in 2012). In Flanders, the median is situated at 29,000 in 2008, 30,000 in 2011, and 16,774 in 2012. This big difference can be explained by the fact that this calculation only takes into account 11 out of 18 festivals, that there is a generalized decrease for the majority of festivals, and especially that one festival decided to cancel its free admissions policy, thereby decreasing its audience size more than tenfold.

Figure 7. Change in audience sizes (2008/2011) in WBF, Flanders and Europe (%)

	2008			2011		
	WBF	**Flanders**	**Europe**	**WBF**	**Flanders**	**Europe**
Less than 3,000	**33**	11	23	**46**	6	27
3,000 – 5,999	23	11	22	20	12	23
6,000 – 19,999	19	6	26	14	18	23
20,000 – 79,999	17	44	21	12	35	20
More than 80,000	8	**28**	8	8	**29**	7
Total	**100**	**100**	**100**	**100**	**100**	**100**

As with the Festudy sample, we can see that these audiences are principally local, both in the WBF and in Flanders, and that the number of audience members decreases as a function of the distance from the festival site. However, by virtue of Belgium's smaller size and the greater mobility thus provided, the percentage of participants on the regional, national, and international levels is higher than for other countries.

Figure 8. The origin of audience: Flanders – WBF – Festudy



Conclusion

Of course, this brief presentation of some of the key variables of our study merits a deeper analysis. We know, for example, that festival activity is not

limited to an intense period of musical programming over the course of a few days. Both prior to and after the peak season, festivals often develop artistic, educative, cultural, and social cooperative networks, first within their local environment, but also with other festivals and organizations both nationally and abroad. Festivals also open themselves to other artistic disciplines (dance, theater, audio-visual projects, etc.) and, depending on the musical genre, establish associative partnerships which are important for organizing a festival's events. In this respect, it is interesting to observe that Flanders and the WBF fix their festival priorities in a different order. In the WBF, the first priority is artistic (37%), then cultural (33%) and territorial (25%). In Flanders, on the other hand, the first priority is cultural (44%), then artistic (38%) and territorial (135). However, these priorities vary in their intensity and composition. Thus, in Flanders, the overall cultural priority is divided into broadening accessibility to cultural events (12%) and ensuring the festive nature of the festival (14%). The artistic objective concerns the discovery of new repertoires (16%) and the celebration of heritage (11%). In the WBF, the artistic priority is principally characterized by supporting new artists (17%). The cultural objective is centered on audience accessibility (15%) and bolstering local production (13%).

Other data regarding programming, change in the number of concerts or artists involved, or the origin of participating artists will be analyzed in later studies. Analysis of the financial dimension of festivals will also be deepened with a closer examination of their expense structures (in terms of artistic, technical, administrative, and payroll expenses) and revenue structures (ticketing, sponsorships, etc.). All festivals consider the issue of funding as a central concern. This is especially linked to festival-generated income, given the view that the amount of public funding made available will, in the best scenario, stabilize in the next few years. Thus, given an increasingly competitive atmosphere, festivals are turning more toward private funding sources. The question of regulating what festivals offer their audiences, then, could become increasingly important, especially considering that audience members are presented with a large range of festivals and a decrease in their buying power.

The context of music festivals in Spain

Lluís Bonet & Tino Carreño

It is not possible to understand the activity and evolution of festivals in Spain without studying the role played by the municipalities and autonomous communities – the Spanish regional authorities – in the cultural field. After several decades of dictatorship, the 1977 Constitution established a system of broad political devolution that allowed a spectacular increase in the public funding of the cultural sector. This growth would not be halted until 2009, as a consequence of the current economic crisis. This crisis has lead to radical changes in the Spanish festival landscape, especially since 2012.

The first music festivals originated in several different contexts, ranging from religious ceremonies and the federation of summer concerts to the creation of original festivals. The Franco dictatorship supported proposals by those friendly to the regime to launch festivals of high artistic quality. This is the case for the *Quincena musical de San Sebastián*, a festival created in 1939, at the end of the Spanish Civil War, and still active today. Other examples can be seen in the *Festival internacional de música y danza de Grenada* and the *Festival internacional de Santander*, both established in 1952. In that same year, the Ministry for Information and Tourism – the institution in charge of media and censorship – announced its plan for national Spanish festivals. In 1957, this plan was finally implemented, and three years later, 400 concerts were scheduled in 27 Spanish cities. Municipalities could participate in this program, which was entirely planned by the central government and ideologically associated with it, providing a means to disseminate its political message and highlight its prestige both nationally and abroad. The fact that it took place during the summer, coinciding with the peak tourist season, allowed the regime to project an international image of openness (Carreño & Colomer 2011). The festivals were classified according to their individual missions:

"Prestigious symphonic music and dance companies were the bulk of the programming for the illustrious festivals of international scope; Spanish folk music and dance would be suitable for festivals with more touristic appeal; theatre and art exhibitions were used to target festivals with a more domestic or local profile" (Ferrer 2007).

Under this policy, the number of festivals grew to approximately 160 festivals in the early seventies, most of which took place during the summer season or coincided with the local festivities each town traditionally held (Ortiz 1983).

During the transition toward democracy in the latter half of the 1970s, the new Ministry of Culture modified the organization of "Festivals of Spain," drastically reducing the role of the central government. From this point onward, the overwhelming majority of financial support for festivals came from local and

regional government, often taking over ownership of festivals or providing funding when they were non-profit initiatives. In the 1990s, the foreign phenomenon of rock/pop festivals burst forth in Spain (Hidalgo 2008), and for-profit organizations emerged to promote festivals like the *FIB*, the *Sonar*, the *Primavera Sound*, or the *Bilbao BBK life*. Some of them explicitly associated their brand image with the name of their main sponsor, often a bank or a brand of alcohol.

Festivals expanded rapidly, both in quantitative and geographic terms. Although we do not possess reliable information on this subject,[1] we can estimate that the number of music and dance festivals grew from 438 in 1985 to 989 in 2011, representing an increase of 70%, mostly within the field of music. Our methodology has allowed us to eliminate duplicates and regular season programming from our sample group, giving us an annotated list of 409 festivals for 2011. The festivals included in our sample were required to satisfy the following criteria: they had to have at least 3 complete seasons, 6 or more concerts, and a minimum of 2 days or 12 hours total of music.

Festival distribution by region provides us with surprising contrasts. While some of the autonomous communities like Catalonia or Aragon offer more than 1.5 festivals per 100,000 inhabitants, others like Madrid, Extremadura, and Valencia barely reach a ratio of 0.5 festivals. Such differences cannot be explained by the demographic size of a region, its tourist appeal, or its rural character. Rather, these results are linked to policy decisions as well as social and cultural dynamism.

The size of the municipality does not appear to be a significant indicator for festival number since cities of similar size display very different characteristics in this regard. Nevertheless, most festivals in small cities happen in the summer season while large cities concentrate their festival activity between October and May.

Figure 1. Distribution of festivals by municipalities.

Municipal population	Number of festivals	% festivals	% municipalites	% population	Number of festivals per 100,000 habitants
≤ 10,000	67	16%	90.6%	20.9%	0.7
10,001 – 50,000	115	28%	7.6%	26.9%	0.9
50,001 – 100,000	48	12%	1.0%	12.5%	0.8
100,001 – 500,000	102	25%	0.7%	23.7%	0.9
> 500,000	64	16%	0.0%	16.1%	0.8
Plurimunicipalities	13	3%	—	—	—
Total	**409**	**100%**	**100%**	**100%**	**0.9**

1. The data collected by the Center for Documentation on Music and Dance (INAEM-State Secretary of Culture) is provided directly by organizers with no obligation to subscribe to this service. See the methodological note in www.mcu.es/comun/bases/spa/cdmr/index.html.

Festival distribution by musical genre clearly shows that classical music festivals predominate (40% of the total), followed by rock/pop (27%), world/traditional music (15%), jazz/blues (11%) and multi-style (6%). The face of the festival landscape has changed over the last few years. 50% of Spanish rock/pop festivals are less than 10 years old and concentrate their season over a short number of days while almost 40% of classical music events are 30 years old with programming stretched over a longer period of time.

Figure 2a. Festivals by genres and sub-genres

	Classical music		Jazz & Blues		Modern music	
	3 Primary	3 Secondary	3 Primary	3 Secondary	3 Primary	3 Secondary
Medieval, Renaissance	28%	21%				8%
Baroque	**59%**	18%				4%
Classical (18th – 1950)	**82%**	10%				4%
Contemporary	**44%**	33%	9%	9%	4%	8%
Opera	31%	10%			4%	
Pop – Rock		3%	18%	9%	**100%**	12%
Singer songwriter		3%			19%	12%
Rap, Hip hop				**27%**	4%	**27%**
Techno, Electro				9%	15%	19%
Metal, Hard				9%	12%	15%
Reggae, Ska			18%		23%	8%
Jazz, Blues	5%	10%	**100%**		12%	8%
Traditional	5%	10%		9%	23%	8%
World	6%	19%	18%	18%	23%	12%

When we look at the diversity of the sub-genres present in each festival, we can see that classical music (from the 18th century to 1950) is the most dominant, followed by rock/pop and Baroque music. Classical and baroque music represent the core of classical music festivals, but contemporary

music is included as one of the three main genres in 44% of them and as a secondary choice in one-third of them. On the other hand, modern music festivals are entirely dominated by pop and rock (100% of the events choose it as one of their three main types of music). Reggae-ska, singer-songwriter, techno-electro and rap/hip hop are also significant. However, jazz and world/traditional music festivals are the most open to a wider variety of musical styles.

Figure 2b. Festivals by genres and sub-genres

	World/Trad		Hybrid		Total	
	3 Primary	3 Secondary	3 Primary	3 Secondary	3 Primary	3 Secondary
Medieval, Renaissance			17%	33%	12%	12%
Baroque			33%	33%	**26%**	10%
Classical (18th – 1950)	7%		**67%**	17%	**38%**	6%
Contemporary			17%	17%	21%	18%
Opera			17%	33%	14%	6%
Pop – Rock	13%	7%		17%	**31%**	7%
Singer songwriter	7%	7%	33%	17%	8%	6%
Rap, Hip hop	7%				2%	10%
Techno, Electro		7%			4%	7%
Metal, Hard					3%	5%
Reggae, Ska	7%	7%	17%		10%	3%
Jazz, Blues	13%		**50%**	33%	22%	8%
Traditional	**67%**	7%	33%		21%	8%
World	**53%**		17%	50%	20%	14%

Public funding policies and festivals

One of the specific characteristics of Spanish festivals is their high degree of economic and institutional dependency on local and regional governments,

a situation that is not readily apparent when looking at the formal status of the festival organization. For instance, a quarter of non-profit festival organizations and 11% of for-profit festival enterprises are owned directly by the government.

Figure 3. Festival ownership by legal status and musical style

	Ownership Model			
Legal Status	**Total**	**Public**	**Private**	**Non-profit**
Public	27%	100%	0%	0%
Private	20%	11%	89%	0%
Non-profit	53%	24%	0%	76%
Total	**100%**	**42%**	**18%**	**40%**

Musical style	**Total**	**Public**	**Private**	**Non-profit**
Classical music	40%	62%	0%	38%
Jazz-Blues	11%	45%	27%	27%
Pop-rock	27%	23%	35%	42%
World & Traditional	15%	27%	27%	47%
MultiStyle	6%	33%	17%	50%
Total	**100%**	**42%**	**18%**	**40%**

Sixty-two percent of classical music festivals are governmentally owned, while 38% are in the non-profit sector. Pop/rock and world/traditional music festivals present a different dynamic, with 77% and 73% respectively owned by private organizations. When we add that 35% of rock/pop festivals and 27% of jazz and world/traditional festivals are owned by private enterprises, we can see that for-profit organizations play an important role in these genres, especially if one considers that most of them are less than 10 years old.

The high proportion of festivals owned and directly managed by the public sector is one of the specific features of the Spanish festival landscape. Compared with other Western European countries displaying a similar amount of government support, the high degree of political intervention in programming policies might be surprising. One possible explanation is due to the political history of Spain, a country in which civil society was dramatically weakened by its 40 years of dictatorship. Consequently, governmental involvement in the cultural sector, particularly on the local and regional level, served to compensate for this low degree of civic participation. Moreover, Spanish political culture tends to see initiatives which are not directly controlled by the government as less legitimate. A large majority of the actors in the cultural sector have thus found the ideal partner for implementing their

projects in the territorial authorities, thereby creating a dependent relationship that is fairly difficult to modify during a period of economic crisis.

Figure 4. Sources of revenue by festival sector

	Public			Private		
	Value		% average	Value		% average
Ticketing	123,105	21.2%	15.8%	706,746	50.6%	50.0%
Owner contributions				30,983	2.2%	7.9%
All public funding	364,668	62.8%	67.8%	151,340	10.8%	15.4%
Local	127,644	22.0%	41.1%	94,829	6.8%	6.5%
Regional	185,849	32.0%	22.6%	56,511	4.0%	8.8%
State	50,012	8.6%	4.0%			
European Union	1,162	0.2%	0.2%			
Direct contributions	293,954	50.6%	42.2%			
Subsidies	70,714	12.2%	25.6%	151,340	10.8%	15.4%
Sponsorship	75,307	13.0%	12.8%	256,821	18.4%	19.0%
Other revenues	17,238	3.0%	3.7%	251,768	18.0%	7.6%
Total	**580,319**	**100%**	**100%**	**1,397,657**	**100%**	**100%**

	Non-profit			Total		
	Value		% average	Value		% average
Ticketing	109,247	43.6%	16.7%	213,691	36.6%	21.8%
Owner contributions	44,661	17.8%	9.4%	22,967	3.9%	5.1%
All public funding	48,472	19.3%	53.5%	203,051	34.8%	53.5%
Local	22,625	9.0%	28.3%	80,232	13.8%	30.3%
Regional	18,205	7.3%	19.3%	97,487	16.7%	19.0%
State	7,568	3.0%	5.8%	24,797	4.3%	4.1%
European Union	74	0.0%	0.0%	535	0.1%	0.1%
Direct contributions				127,954	21.9%	18.4%
Subsidies	48,472	19.3%	53.5%	75,097	12.9%	35.1%
Sponsorship	28,405	11.3%	10.8%	86,443	14.8%	13.0%
Other revenues	19,860	7.9%	9.6%	56,912	9.8%	6.7%
Total	**250,645**	**100%**	**100%**	**583,065**	**100%**	

The main channel through which the government chooses to support festivals is with financial aid policies. Ticketing only accounts for 36.6% of the

total income generated by Spanish festivals in 2011, coming to an average of 583,064 euros. The second largest source of income comes from public funding (34.8%), with private sponsorship and other sources of income (catering, merchandising, rentals, fees for educational programs, etc.) trailing far behind. This high level of public support is a source of vulnerability for the cultural sector, particularly when budgetary reduction has become the norm. This dependency on governmental support is more significant for the smallest festivals. If we analyze the ratio of government support to the total budget on a festival-by-festival basis, the average percentage of public funding is situated at 53.5% and not 34.8%. This is much higher than the average obtained by the same means with the Festudy sample. The clearest difference is in absolute terms, the average amount of public money per festival is 203,051€ in Spain, whereas the European average reaches 262,267€.

In terms of the ownership model for festivals, the distribution of public funds appears to be highly uneven. Publicly owned festivals receive 62.8% of their income from the government, most of it through a direct monetary transfer from the owner's budget, to which is sometimes added a subsidy from other public authorities. In the case of for-profit festivals, public funding represents only 10.8% of the total income, while ticketing receipts and sponsoring account for 87%. The case of non-profit festivals is more complex. Globally, government money represents 19.3% of their budget, but the average percentage (on a festival-by-festival basis) comes to 53.5%. This can be explained by the fact that many small non-profit festivals rely heavily on these funds, while a smaller number of very large non-profit festivals have a smaller proportion of public funding in their budgets.

Most public support comes from municipal and regional governments, while the central administration and the European Union play a much more marginal role. Municipalities are a more important financial source for most small festivals, especially those that are government-owned or non-profit. The autonomous communities and the central administration invest more in big-budget events. On the other hand, classical music festivals obtain 61% of their income from governments, a far higher percentage than the subsidies enjoyed by the biggest festivals of modern music.

Traditionally, many public administrators have based their support for festivals on a rhetoric which is extrinsic to cultural policy objectives. The arguments they set forth are economic in nature, referring to job creation or tourism, or associated with strengthening local identity or image. This rhetoric does not always correspond to reality: very few festivals are truly tourist attractions, though they may in fact complement the leisure activities already offered in the locality. Nevertheless, a growing number of festivals benefitting

from public support do attempt to justify their existence on social, artistic and economic levels (Herrero-Prieto & Devesa-Fernández 2007).

Unique characteristics of the Spanish music festival landscape

One of Spain's remarkable features can be found in the smaller size of many of its music festivals, a fact that does not necessarily equate to smaller audience sizes. The average number of concerts organized in 2011 is 26 for Spain while the same figure is 41 for Europe (including Spain). This is also reflected in budget sizes: 43% of Spanish festivals have total budgets below the 80,000€ mark, while this only characterizes 21% of European festivals. This smaller size can also be seen in the domain of human resources. In Spain, 80% of the festival workforce is only active during the festival season. Moreover, the average number of employees in Spain is 90, whereas the same figure is 180 for Europe. The different statuses of festival workers is also a point of comparison. In Spain, volunteers represent 21% of the workforce, compared to more than 65% in Europe. Inversely, 45% of the workforce in Spain is supplied from other sources, compared to 12% in Europe. This last figure is consistent with one of the Spanish characteristics we have already observed: the number of festivals directly managed by municipalities. Given this relationship, it is understandable that government authorities would assign part of their personnel to staff festival events.

In terms of audiences, the differences between Europe and Spain are more difficult to interpret. The percentage of very small festivals (those having fewer than 3,000 participants) may indeed be higher in Spain. However, the average size of audience in Spain is 18,300 participants (with a median of 5,500), while in Europe this figure is 23,700 (median 6,500).

Given the acute effect the economic crisis has had on Spain, the festival landscape is currently undergoing major changes. This marks a break from the three preceding decades in which there was robust growth in the number of new festivals. The absence of 2013 data does not allow us to quantify what will probably be the most severe phase of the crisis yet. However, 2012 is the first year in which there is a global decrease in festival budgets. Two main sources of funding plummeted in only one year: government aid (with an average decrease of 20% but affecting 71% of all Spanish festivals) and sponsorship (an 18.5% drop affecting 41% of the festivals). Ticketing receipts have also decreased, but only by 3.4%. Festivals have tried to compensate for these losses by emphasizing other sources of income (22% through catering, merchandising, or other sales) and through contributions from their private owners (37%).

The financial involvement of the different government levels is indispensable for the survival of most Spanish music festivals: 58% of them receive more

than half of their budget from public sources. Now, they are drastically reducing their commitments to this mode of financing. Moreover, in September 2012, the central government changed the VAT rate for performing arts events, increasing it from 8% to 21%, while the 2010 rate was only 7%. The first estimate of the effects this has had on the modern music sector is a 29% reduction in revenue over the last four months of 2012 when compared with the same period in 2011.[1] The festivals that suffer the most from this situation are those owned by public authorities, since they have less flexibility than their privately-owned counterparts in obtaining other sources of financing: a 22% decrease in government financing represents a 20% decrease in their total budget. In terms of musical genre, only rock/pop festivals have seen an increase in their total budget (9%) because of growth in their ticketing receipts (24%) and other income sources (33%).[2] As we have already noted, this genre relies less heavily on public funding. On the other extreme, the genres with the largest budget reductions are world/traditional (27.2%), jazz/blues (20.6%), and classical music (16.3%).

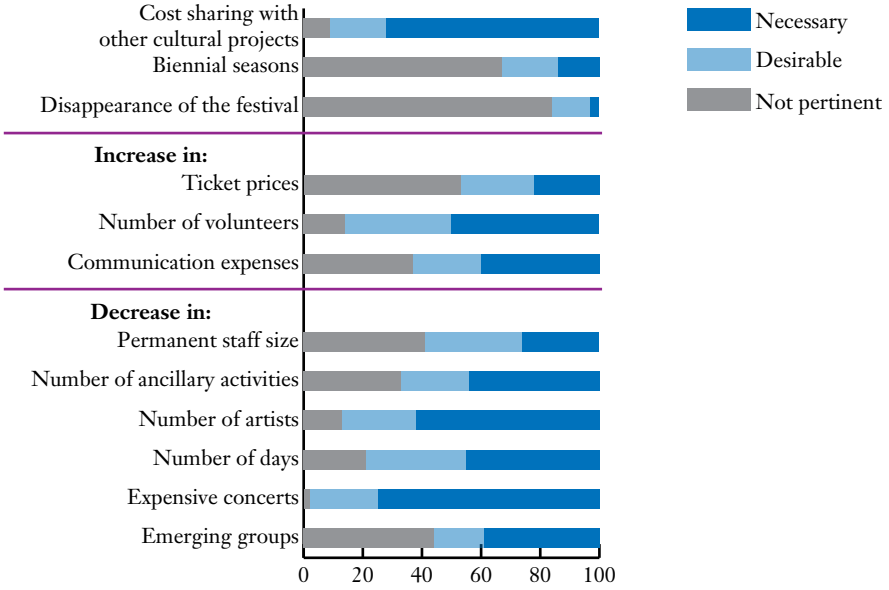
The second area of budgetary reductions is with corporate sponsorship and patronage. In absolute terms, we can see a significant decrease for all festivals. However, because small festivals have tended to attract less sponsorship than their larger counterparts, they have remained relatively unscathed by this situation, even at times showing an increase in sponsor contributions. The largest festivals, on the other hand, have suffered the most from these reductions, both in relative and absolute terms. In general, corporate sponsorship and patronage have only become significant in prestigious festivals attracting large audiences or whose target demographic corresponded to the interests of the brand. As examples, one could associate luxury goods or banks with some music festivals or alcoholic beverages, energy drinks, radio stations, and mobile phone companies with others. This rule is no longer true in times of crisis, leading many events to develop drastic strategies, while others are forced to cancel. For instance, among the 100 festivals comprising our 2011 sample, 5% of them did not open for the 2012 season. Obviously, the majority of festival managers do not consider this option. The most accepted strategies against the crisis are: a) decreasing the number of very expensive concerts, b) sharing expenses with another cultural organization or project, c) reducing the number of artists in the program, and d) increasing the number of volunteers. Almost half of the festivals have chosen collaboration as a viable strategy, with 40% of our sample collaborating with other festivals, concert

1. Asociación de promotores musicales (2013) IV Anuario de la música en vivo. www.apmusicales.com/anuario.swf.

2. Since most rock/pop festivals take place during the summer season, they have not yet been affected by the increase in the VAT.

halls, or music schools. The strategy of attracting more volunteers, on the other hand, is more often adopted by classical music festivals. It is interesting to observe that a significant number of festivals classified several strategies as irrelevant in our questionnaire. These include increasing ticket prices (53%), lowering salaries (43%), and booking new artists (40%).

Figure 5. Strategies for coping with the crisis



The economic situation has forced organizers to be inventive both in terms of their programming and in how they justify their festivals both socially and economically. In terms of a festival's artistic contribution, the dominant trend is to focus more on the "product" being offered and its commercial appeal rather than on the transcendent impact a festival can have on its audience members. Some festivals have indeed been able to expand sonic possibilities, becoming models for other festivals. Their role is particularly relevant in complex genres such as avant-garde music or some of the transgressive styles of popular music, but this can also be seen in more established musical genres such as classical music or jazz.

In economic terms, some large festivals have commissioned studies to quantify their economic impact. However, to date, very few festivals base their legitimacy on their social contribution or their grassroots work with local communities. Generally, this sort of commitment is more visible in small festivals organized by non-profit entities, even if some for-profit enterprises are also involved in these projects. Creating new audiences is one of the key functions

of any festival committed to making culture more accessible. However, there have been virtually no studies of audience composition over a longer period of time: only 13% of Spanish music festivals have current data on this subject, as opposed to an average of 34% in Europe.

From the point of view of festival organizers, the key challenge facing festivals is to increase their audience sizes. In fact, over the last few years, 80% of Spanish music events have both strengthened and changed their audience strategies. However, the need to increase audience size could lead to a greater reliance on big-name performers who can contribute to a festival's promotional campaigns. Consequently, signing alternative or complementary musicians could show a decrease if they do not contribute significantly to the festival image or help lead to financial solvency. This is a very chaotic situation in which some festivals are being cancelled while others, with interesting management models and artistic projects, are being born. Today, one of the cooperative strategies available to festivals is found in exporting a brand through the creation of franchises or stable cooperative ventures on the national and international level.

To conclude, the domain of music festivals, much like other artistic sectors, is undergoing significant changes. On the one hand, there is a great deal of risk being faced by festivals in the public sector, as is also the case for non-profit private festivals that receive large subsidies. On the other hand, festivals with an innovative project or a clear market-based strategy, generally owned by private enterprises, are able to survive the crisis through maintaining audience loyalty with attractive and unique programming.

Festivals in Finland

Kai Emberla

Introduction

Finland's festival tradition, dating back to the 19th century, is surprisingly long. Its origins can be traced back to German public song festivals, the first of which took place in Würzburg in 1845. The Germans then exported their song festivals to the Baltic countries, and Estonia's first song festival, held in Tallinn in 1857, inspired the Finns living just on the other side of the sea (Valkonen Kaija & Markku 1994). At that time, song festivals in Finland began to flourish in many cities, but the quality was amateurish. Little by little, the artistic quality improved, and already in the beginning of the 20th century there was a healthy festival culture in many parts of the country. In its early days, this festival culture would not have been possible without the rural and neighborly traditions of mutual aid. Even then, ticket sales were an important element (Valkonen Kaija & Markku 1994).

Idealism, money and endless volunteer work was needed when Finland's first international opera star Aino Ackté (1876-1944) had the idea of producing operas in the medieval fortress of Olavinlinna. The first Savonlinna Opera Festival opened in July of 1912. The festival continued until 1916, then returned in the summer of 1930, fading away once again until it was brought back on a permanent basis in 1967, now being one of the most well-known opera festivals in the world. (Valkonen Kaija & Markku 1994).

Finnish festival culture was somewhat stable until the 1950s, but the end of this decade and particularly the 1960s were marked by rapid growth. In the 1950s, the energetic young composer and music critic Seppo Nummi (1932-1981) had a dream: an unbroken chain of cultural events, associating the arts with the longer arctic daylight hours in an ecstasy lasting all summer long. In 1957, Nummi got a chance to prove his talents when he was appointed program director of the Jyväskylä festival of music and culture. In his hands, the event developed into an ambitious summer carnival of the arts, accommodating Stockhausen and modern Finnish poets, noisy debates and intimate chamber music (Valkonen Kaija & Markku 1994). Seppo Nummi showed the way to others, clearly demonstrating that it was indeed possible to create and produce top class performances in remote places all over Finland. Little by little, new festivals were founded by enthusiastic local people, whether these were musicians, poets, theatre directors, or dancers.

When the Finland Festivals (FF) association was founded in 1968, it had eight members. The board of the FF made a crucial decision: "The membership

of Finland Festivals will not be increased without specifying an appropriate reason, such as establishing a festival in northern Finland." It turned out that the number of board members would rapidly grow! The idea of the Finland Festivals association was not only to act as a lobbyist for the festivals, but also to serve as a marketing unit with the goal of branding Finland as a great place to visit for international cultural tourists. Already in 1971, the Finnish cultural summer had 600,000 visitors – much more than anyone had dreamed of. In 1979 this figure had reached 800,000 visitors. By 2010, the number of members in the Finland Festivals association has grown to almost 100 members, and the events they organize take place around the calendar year, not only in summer. Today, total annual attendance at Finland's festivals has grown to around two million people. Music festivals are still the backbone of the festival sector, but there is also a strong trend toward festivals centered on other artistic disciplines. Finland has reached a situation where almost every city and every village wants to have its own festival.

Current national, regional and local policies

Convinced by their capacity for rapid growth and ambitious development, the Finnish state came to understand that festivals should be a part of its general cultural policy. The very concept of "cultural policy" was created in the 1960s with new mechanisms for supporting cultural institutions like symphony orchestras, theatres and museums. Festivals were – and still are – on the sidelines of this development, mainly due to the fact that festivals are not "institutions" like orchestras or theatres. Rather, they are treated more as "projects".

Nevertheless, in the 1960s, festivals began to receive small subsidies from the state, though the sums still represented a fraction of those awarded to permanent venues. At the present moment, state subsidies cover on average only 10 percent of festival budgets, with municipal subsidies being a more important source of public funding. The criteria for receiving state support are rather simple: the festival has to have a "national value" and display "high artistic quality". What this means in practice remains rather vague, with an application process that is also bureaucratic. The applications are sent to the Ministry of Education and Culture, after which they are sent to the Arts Council of Finland for a first round of decisions, before being sent back to the Ministry where the Minister of Culture him/herself makes the actual decision. Because of this slow bureaucratic procedure, the system will be changed in the near future, provided that political support for this reform remains constant. The goal is to simplify the system on two different levels: big festivals would receive the subsidies directly from the Ministry and smaller festivals would receive their subsidies from local subdivisions of the Arts Council (Kulttuuritapahtumien avustusjärjestelmän uudistaminen 2011).

The Ministry of Education and Culture annually receives more than 200 applications, and in 2013, grants were allotted to 166 festivals. The total amount of state subsidies for festivals was 5.15 million euros, with the subsidy levels displaying a wide degree of variation: the largest amount was granted to the *Savonlinna Opera Festival* (740,000€) while the smallest was allotted to the *Music by the Sea* festival (3,000€). However, festival subsidies remain minimal in the state cultural budget, representing only slightly more that 1 percent of the total. It is also important to remember that all the state money given to festivals is derived from state lottery funds (Veikkaus Oy) which are then reallocated to the cultural sector in addition to supporting science, sport, and youth policy. Thus, it is not taxpayers but lotto gamblers who support Finnish festivals.

Key financial figures

Finnish festivals are very largely self-financing. Out of a total of 64 festivals in our sample, an average of 70 percent of their revenue is derived from ticket sales, business partnerships and other fundraising activities. Only 30 percent of their income is from subsidies granted by local and central government or various foundations. The aggregate budget of our 64 festivals was in excess of 38 million euros, and a conservative estimate of total festival revenue in Finland is between 45-50 million euros. Festivals generate an average of 70 percent of their income from various revenue sources. The principal source is ticket sales, which account for 16.6 million euros or 43 percent of their total budget. Business partnerships provide another 11 percent, with 16 percent more coming from various other revenue sources such as restaurant sales, merchandising, and other miscellaneous income items (cf. Study of Festival Finances 2010 for the preceding discussion).

The single largest expense lies with artistic and production costs, which take up 51 percent of the budget. Marketing costs amount to 10 percent, with fixed costs for clerical staff and rent another ten percent. Other unspecified expenses total 18 percent. The size of the latter miscellaneous expenses is due to the fact that many festivals are unable to distinguish between production and other costs, because these often form part of a larger expenditure item (such as the cultural activities budget of a local authority). Most of these expenditures also include artists' fees and other costs associated with actual production. (Finland Festivals 2010).

Fixed payroll costs constitute only 11 percent of total expenditure for the 64 festivals studied. This high degree of administrative efficiency arises because these festivals employ an aggregate permanent staff of only 126 people. Temporary staff tends to be hired at the time of the actual festival, employing slightly fewer than 1,500 people. Volunteers also continue to be vital to the

success of festival events, more than five thousand of whom were involved in festival activities during 2010 (Study of Festival Finances 2010; Iso-Aho, Juha 2011).

Cultural issues and strategies

As said earlier, Finland's festival sector was founded by artists and art lovers, not by city councils or tourist offices. For this reason, the *raison d'être* of the festivals is still strongly artistic in nature. However, as festivals have grown bigger and bigger and the audience figures are reaching impressive heights, other aspects are starting to become more important. The economic impact plays a crucial role, particularly in terms of justifying public support of festivals. Much research has been conducted on this element, usually producing very similar results (Pasanen, Taskinen & Mikkonen 2009). A survey of one of the latest studies on the economic impact of festivals (Tampereen yliopiston… 2009) will provide us with fairly typical results:

— 82% of the audience said the festival was the main reason to travel to the city of Ikaalinen, the site of the festival;
— On average, a festival visitor spent 208 euros over the course of the festival;
— The spending was distributed over the following items:
  · festival tickets 24%,
  · restaurants 23%,
  · accommodations 20%,
  · local shops 15%,
  · gas stations 8%,
  · other expenses 10%.

These figures clearly show the strong economic impact of a festival where most of the audience comes outside of the festival territory. According to the research, this festival generated 1.8 million euros for the local economy while the municipal subsidy amounted to only 60,000€ and the state subsidy to only 56,000€. Because of substantial revenue coming from tourists, big and small cities alike are seeing new opportunities in cultural tourism and particularly in festival tourism (Eronen & Ruoppila 2008). This has also been seen on the state level, and the Ministry of Education and Culture, as well as the Ministry of Employment and Economy, have identified this field as likely to develop in the future (Kulttuurin matkailullinen tuotteistaminen 2011). Both ministries have supported festivals in order to further strengthen cultural tourism products, while the Finnish Tourist Board (Visit Finland) has also placed festivals as a high priority in its agenda.

Another aspect is the fact that festivals are spread throughout the country, and smaller cities or even villages can have a world-class festival. This is an important political issue, though it does not appear in the criteria for state support.

Festivals are a means of creating cultural events in places where permanent venues are not present, and in many remote areas, festivals provide the only cultural activity available for the entire year. This is a powerful justification for subsidies since Finnish cultural policy still strongly defends the idea of "access to culture for all."

The audience figures show that free performances are at the core of festival activity in Finland. In 2012, the members of Finland Festivals sold 735,000 tickets while the aggregate festival audience approached two million. The "culture for all" philosophy is also reflected in these figures, as municipalities in particular usually require the festivals to organize free events in order to receive a municipal subsidy.

There is a great deal of research done on festival audiences, the biggest festivals conducting surveys every year. However, since the festivals are very different in terms of cultural genres and target audiences, it remains difficult to make generalizations from this data.

The contemporary festival landscape

The organizational structures of festivals can be divided into 4 categories: not-for-profit associations, cultural foundations, festivals organized by municipalities, and private companies.

The overall majority of festivals are run and owned by not-for-profit associations, and their managerial practices are regulated by a legal framework specific to this kind of organization. Thus, in cases of a budgetary surplus, the organization is not allowed to share profit with its owners or members and is required to reinvest it in the following season of the festival. Not-for-profit associations can also choose whether they will be subject to the VAT (value-added tax) system. Roughly the same practices apply to festivals owned by foundations.

A number of festivals are run directly by cities, an arrangement that is rarely seen in France but is more common in Spain, for example. In practice, this means that civil servants employed by the city are responsible for the day-to-day activities of the festival. Economically, this structure guarantees a fairly stable cash flow for the festival. However, most cities are burdened with a heavy bureaucratic framework, making the decision-making process very cumbersome when compared with festivals run by not-for-profit associations.

Private companies are seldom found in the festival field since running a festival is a very risky business and rarely presents opportunities for profit.

The geographical distribution of festivals in Finland is very wide, making the festival sector the most democratic way of providing access to art in the country. Most of the festivals take place in the summer time, and the peak season is in July when most Finns can enjoy their summer holidays and the climate is at its best. However, more and more festivals are held outside the summer season, particularly in bigger urban centers.

Festivals in France

Aurelien Djakouane & Emmanuel Négrier

From an historical point of view, festivals in France are a relatively recent phenomenon. Even if the oldest among them first appeared in the 19th century, the number of festivals celebrating more than 50 seasons is relatively limited. Among these, we can cite *Les Chorégies d'Orange* (1869), which is one of the oldest opera festivals in the world and the oldest festival in France, *Les Nuits de Fourvière* in Lyon (1946), the *International Music Festival* of Besançon and the *Festival of the Lyric Arts* in Aix-en-Provence (both created in 1948), and the *Pablo Casals Festival* in Prades (1950). These four festivals illustrate how favorable the post-war period was for French cultural dynamism, culminating in 1959 with the creation of the Ministry of Culture. Nevertheless, for a long time festivals remained scarce. The number of events was very limited, as was the capacity to benefit from public or private support. While in the 1970s, several famous festivals (Monterrey, Woodstock, Isle of Wight) took place in other countries (the United States, the United Kingdom, for example), France remained at a remove from the rise of these big pop or rock events (Chirache, Delbrouck, Jolivet & Ruffat 2011). Apart from some short-lived attempts, the lack of financial resources and support from public authorities and, indeed, the official strategy of restraining the emergence of festival projects delayed the development of festivals in France. As a result, there were few events, and these were often restricted to classical music. Jazz is an exception, however, as the Nice or Juan-les-Pins jazz festivals were both created in 1960.

Thus, we can say that the emergence of festivals really began in the 1980s. Several factors explain why festivals became a much more important element of the French artistic offer, at least until the present day. The first factor is related to the change of national cultural policies when the Socialist Party won the presidential election in 1981. In this new government, Jack Lang, the Culture Minister, played an important role, especially by doubling the budget of the Ministry. With increased financial resources at its disposal, the ministry was able to diversify the support of cultural policy as well as expand the scope. This diversification was accompanied by an official recognition that festivals can have a catalytic effect on the cultural sector. *La Fête de la Musique* (Music Fest), *Les Journées du Patrimoine* (Heritage Days), and *Les Arts au soleil* (Arts in the Sun) are some of the events initiated by the Ministry of Culture, some of which are now imitated in other countries. Thus, support for festivals became part of this new direction of national cultural policy. This policy shift took place during a period when the Ministry itself provided a third of public funding for culture. It also had a high level of legitimacy and of influence both in the cultural sector and in territorial policies.

A few years later, France began its program of governmental decentralization by transferring powers from the central government to local authorities. The local level thus began to be more involved in cultural policy, particularly through their support of festivals. This, then, is the second factor. From that moment onward, each local authority (at the municipal, departmental, and regional level) was better able to develop its own cultural policy in parallel with the State, and since then their role has been growing stronger. Taken together, they provide more than two-thirds of public funding for culture. Local authorities have supported the creation of many festivals in all artistic fields (Bénito 2001). Music, however, still remains clearly dominant in terms of the total number of events.

The third factor is related to the crisis in the record industry (mainly due to an increase in free music downloads from the Internet). This crisis has given added value to the role of live performances in the music industry. As in many other countries, the place of festivals within the music economy is now emphasized. For all styles, especially modern music like rock or electronic music, festivals have become a major source of income. This phenomenon has led to a further increase in the number of festivals, and increased the competition between them (in terms of audience, advertising, public support) at both the national and European level.

The rest of this chapter is divided into three parts. The first part draws a portrait of the French festival landscape. The second discusses the relationships between festivals and public policy. Finally, the third concerns the challenges that festivals are now facing.

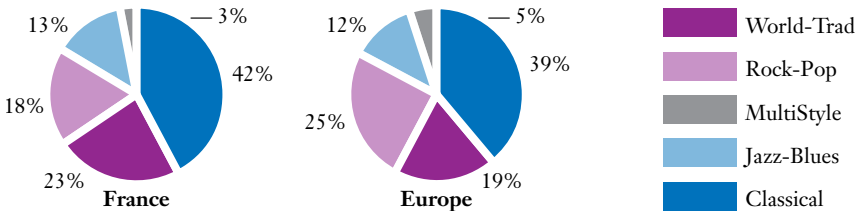
The French festival landscape

The exact number of festivals in France remains unknown (Waresquiel 2001: 283) quite simply because of the increasing growth rate in the festival sector since the 1980s. However, we do know that music is the most robust dimension of the French festival landscape and is very esthetically diverse. This can be seen in a 2012 study conducted by the SACEM[1], with nearly 800 festivals as its base. We can also see that festival activity takes place throughout the year, largely exceeding the time frame of the season itself even though July and August represent the peak period of festival activity (48% of French festivals). Thirty-two percent of the festivals are held during the pre-season (March-June), while another 16% take place during the post-season (September-November). Finally, festivals are not equally distributed throughout France. Regions like PACA, Rhône-Alpes, Paris, and Brittany have a higher concentration of festivals than others.

1. The SACEM (Société des Auteurs, Compositeurs et Éditeurs de Musique) is a French professional organization which protects authors' rights and provides them with compensation.

Our Festudy sample mirrors this diversity (figure 1), though we cannot verify that it is entirely faithful to reality. It must also be said that the artistic choices made by a majority of festivals are becoming more and more diverse and meld many different genres. Just as the musical sector is becoming more fragmented, today's festivals rarely limit their programs to a single musical style. Since artists are the determining factor in a festival-goer's decision-making process, diversifying the program creates links between different musical genres and promotes more mixed audiences.

Figure 1. Festival distribution by dominant musical genre



Two musical genres appear to be able to move between different musical worlds with more ease than others: modern music and electronic music. Jazz festivals are open to these two genres, as are contemporary music festivals, being closely related to them. As for world music festivals, they tend to include electronic music and hip hop, all three displaying esthetic similarities. Classical music festivals, too, have broadened their programs to include jazz and world music, often for thematic reasons. Only modern music festivals seem to be less disposed to including radically different repertoires, though they are already based on generic diversity. Finally, we can see that multistyle festivals are largely based on classical music, a fact that underscores their ability to broaden esthetic horizons and their desire to part ways with elitist or selective cultural models.

A central role in disseminating music and broadening cultural accessibility

In 2011, the festival sector still displayed general growth: "more festival visitors, more ticket sales, twice the number of audience members, lower average prices" (CNV 2012). Festivals are thus crucial to how music is being created and shared in France. The *Centre National de la Variety* (CNV) estimates that the festival sector contains 20% of all concert-goers, 16% of all ticket sales, and 11% of all performances with paid admissions. Moreover, audience sizes for concerts are much higher for festivals than for concert halls (915 admissions on average for festivals as opposed to 497 for concert halls), while the average ticket price is significantly lower (25€ versus 32€). Festivals represent more than one-third of total admissions for jazz, modern music, and world

music performances. They thus have more success than isolated concerts during the peak or off-season.

The Festudy research, covering the 2009-2012 period, shows that audience sizes in France are above the average percentiles for European festivals (figure 2). As opposed to other countries, France displayed continued growth in 2012, though this is not at the same rate for all musical genres (figure 3).

Figure 2. Average and median change in audience size

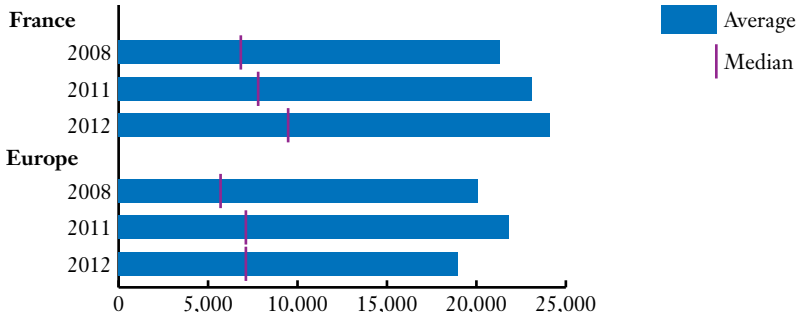


Figure 3. Change in audience size by musical genre

Musical genre	2008	2011	2012
Classical	17,258	15,819	15,450
Jazz-Blues	25,333	26,087	26,910
Rock-Pop	27,348	36,477	40,148
World-Trad	23,667	27,484	29,144
Multi-Styles	13,897	12,349	14,328

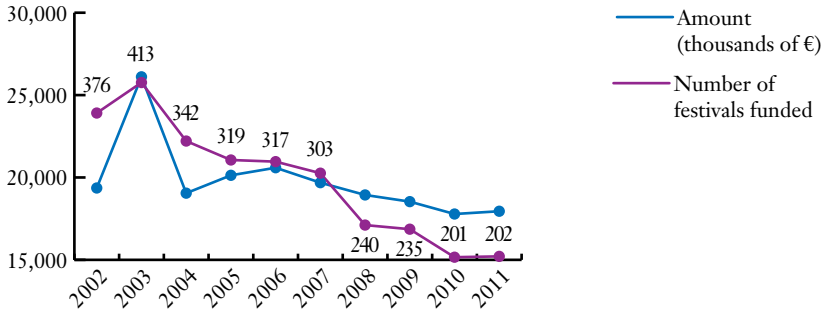
In opposition to the general trend, audience sizes for classical music show a slight decrease. However, this represents a return to normal patterns after the exceptional numbers for 2008. 2012 audience sizes are often very close to those recorded in 2008. World music and rock/pop festivals, on the other hand, have shown such spectacular growth that their very appearance has been modified. For these festivals, the most probable interpretation is of continued growth in audience size since 2008. An example would be the festival *Au fond du Jardin du Michel* in Lorraine, with attendance figures going from 13,000 to 22,000, making us wonder about the size of this reputed "*jardin*" (a field, in reality). We can also cite the *Trois Éléphants* in Laval or the *Déferlantes* in Argelès as examples of festivals where audience sizes have doubled. This is equally the case for Montpellier's *Internationales de la Guitare*, going from 50,000 visitors to over 100,000. Jazz festivals also partake of this dynamic, though to a lesser degree. In France, the festival sector remains robust and

does not seem to be affected by the economic crisis. Free admissions policies are widespread in the French festival landscape, and this is perhaps one of the factors contributing to large audience sizes, but it is certainly not the only one.

The place of festivals within cultural policies

Over the last 50 years, national policy concerning festivals has changed constantly. In the beginning of the 1980s, the state supported several initiatives during a period of relative scarcity. In the 1990s, it introduced new criteria in response to the rapid increase in the number of festivals. First, it targeted prestigious events such as the *festival d'Avignon* (theater), the *festival d'Aix-en-Provence* (opera), and the *Festival de Radio-France* in Montpellier (classical music). However, it was also much more selective in its financial support for smaller festivals, aiding those identified by the DRAC (the Regional Directorate of Cultural Affairs) as having innovative artistic projects. With continued growth in the festival sector in the 2000s, the state decided to reduce its financial support. One can wonder, therefore, if festivals have not been "victims of their own success" (Leleux, Blondin, & Laurent 2013). Between 2002 and 2011, the number of festivals receiving subsidies dropped sharply, down from 376 to 202, while state endowments went from 19 to 17 million euros. The automatic effect of this was to increase the average subsidy amount for each festival. From then on, state support has been concentrated even more on prestigious events: around thirty receive 500,000€ each while nearly 200 receive 10,000€ each.

Figure 4. Change in state funding of festivals



Source : Leleux, Blondin & Laurent 2012.

The past ten years represent a turning point in the state's festival policies. The decrease in the number of subsidized festivals clearly shows that the state considers them to be less important than permanent cultural venues. This can be seen in a 2003 directive which announces two important criteria for the state funding of festivals. Here, funding is allotted according to the national

significance of the festival and the role it plays in structuring cultural activity in its territory throughout the year. Nevertheless, this directive did not have a major effect on the festival landscape for two reasons. First, it was not consistently applied on the regional level (Négrier & Jourda 2007). Second, festivals benefit from the combined financial support of several different authorities, which sometimes cushions the decreases in ministerial funding.

More recently, state discourse has again changed. It now emphasizes the territorial and social dimension of a festival's artistic project: "Festival support must remain based on certain criteria. It must help finance events which promote independent artistic groups offering an innovative artistic program that is influential on both the national and international level. It must also support festivals which work to spread culture throughout their territory or to attract new audiences in order to raise public awareness of cultural events" (Directive Nationale d'Orientation, 09/23/2011). Several factors can explain this change in attitude. First, it is difficult to accept a Malthusian attitude in a country where the central government is the final authority on cultural policy. Second, new festivals have shown themselves to be useful not only in spreading access to cultural events but also in bolstering economic development (Le Guern 2008). In the modern music sector, for example, festivals have become major economic players in a market damaged by plummeting record sales and, for some concert halls, lower audience sizes.

In the end, state support for festivals is tapering off for all but a few flagship festivals. In our sample, public funding can be found for around half of them (47). For these festivals, subsidies represent around 8% of their budget, with a maximum of 40% for the contemporary music event in Nice, the *Festival de Manca*. Moreover, this funding, only representing 4% of the aggregate budgets of our festivals, also varies by genre. The state supports around 66% of classical music and jazz festivals but only 24% of rock/pop and 38% of world/traditional. This trend is not unique to France since one finds the same trend, even magnified at times, throughout Europe.

With less state funding, regional authorities have become all the more important for festivals, reminding us that festivals serve above all as a tool for regional cultural policies. This is consistent with the origin of audience members, of which an average of 75% come from the same region as the festival itself (Négrier, Djakouane & Jourda 2010).

Local policies for the dissemination of culture

Compared to permanent venues, festivals have much less weight in French cultural policy. Nevertheless, they are now seen more as tools than as sporadic

events within the field of cultural policy, and in this respect, regional authorities have been able to use them to their benefit.

Regions and towns compete with each other over their roles in the festival landscape. If cities provide financial support to a larger number of festivals, the regions invest more heavily in them (figure 5). Of course, this trend varies by region in relation to the number of festivals organized within a regional territory. In Languedoc-Roussillon, a touristic and somewhat rural region of southern France, there are a large number of festivals which receive around 17% of public funding allocated for performance arts. A similar situation obtains in Basse-Normandie (northwestern France) and Limousin, a very rural region in the center of the country, both of which providing regional funding for more than 60 festivals and allocating considerably more than 10% of their regional cultural budget. Lorraine, the now de-industrialized erstwhile steel-producing region in northern France, shows the opposite trend. Here, festivals represent much less than 10% of the total cultural budget of the region. Regions have become more sensitive to both the economic impact of festivals and they image they can provide (Nouveaux Armateurs 2004). They also see them as a means of stimulating the cultural life and more general developments within the region (Collin 2011, Dechartres 1998). Through their financing, regional authorities encourage festivals to spread their events throughout the region. This is the case for the *Festival de Radio-France* in Montpellier, for which the Regional Council provides almost 2 million euros. This can also be seen with the *Festival Ile de France* which receives 1.5 million euros from the regional authorities. The latter festival is an interesting example because it does not take place in one central location. Rather, its concerts are scheduled in over 20 towns within the Paris region.

Figure 5. Distribution of subsidies by government level

Governmental Level	%	Average amount
Municipality and Federations of municipalities	18%	80,470€
Region	14%	120,133€
Department	10%	80,509€
State	4%	59,178€
Europe	1%	3,567€
Percentage of subsidies compared to the total festival budget	47%	426,176€

It is within this sphere of public policy that other regional bodies intervene to provide supplementary aid. In terms of percentage, the financial involvement of municipalities or federations of municipalities in the workings of a festival exceeds regional funding. Indeed, they are the second largest providers of financial assistance after the central government. However, in terms of the

average subsidy amount, the region and the department overtake the municipal level. We can conclude from this that municipalities provide funding to a greater number of festivals, while the other government levels concentrate a higher level of financial support on a smaller number of festivals. Moreover, municipalities must also deal with funding regular parts of the cultural season and permanent cultural venues, which together create a heavier burden. They thus play a crucial role for festivals. Out of the 92 festivals of our sample, only 8 do not receive municipal funds. Municipal involvement can even be of overwhelming importance, as is the case for the festival *Heures d'été* in Nantes. There are no entry fees and the city funds 87% of this event.

Finally, the French departments are also involved. Only 12 festivals do not receive departmental financial aid. Their involvement, however, rarely exceeds 30% of the festival budget. Nevertheless, the *Festival Berlioz* in La Côte-Saint-André in the region of Isère has departmental funding for 55% of its budget and the *Fiesta des Suds* in Marseille for 34% of its budget. The department thus functions as a complement to other funding sources. In rural areas, it compensates for the more limited financial resources of the municipalities. In urban areas, the department is situated between the municipal and regional levels, leading it to implement rather unique cultural policies that run the gamut of financial tools. In this strategy, the publicity opportunities provided by festivals allow departments to enhance their reputation. To conclude, it is the case that every festival within our sample receives at least some financial support from regional authorities.

The European Union, a minor actor?

There remains a group of 11 festivals receiving financial aid from the European Union. This is not exclusive to France. European funds are distributed by the ERDF (European Regional Development Fund) which uses criteria similar to those of the French regional authorities (ensuring the equitable treatment of regions, rehabilitating high-risk neighborhoods, promoting regional cooperation, etc.), though there is more emphasis placed on sustainable development practices.[1] The clause concerning support of "European cultural festivals," found in section 1.3.6 of the European Union Cultural Program[2], is rarely cited. This is perhaps due to the number of obstacles that must be overcome in order to receive financial aid. Among these, an eligible festival must show that a minimum of seven countries participate in its program, thereby demonstrating its European profile. In 2011, the total endowments of this program barely reached 2.5 million euros, with the largest grant per festival situated at 100,000€.

1. http://www.europe-en-france.gouv.fr/Configuration-Generale-Pages-secondaires/FEDER – Retrieved on 11-07-2013.

2. http://www.relais-culture-europe.org/Festivals.651.0.html.

The European Union's influence makes itself felt more through initiatives undertaken by regional authorities. Their funding requirements serve to relay some of the EU's directives, aligning festival organizers with EU policy. This is the case for sustainable development. Consider the fact that many departments and cities follow Agenda 21. The cultural sphere of public policy is particularly attentive to these themes since many regional and local authorities align their cultural initiatives with Agenda 21, especially in terms of cultural diversity and sustainable development (Blouet 2006). Sustainable development is now commonly a part of festival objectives and can be found in an increasing number of charters, criteria, and financial packages, especially on the regional level (Brittany, Limousin, Midi-Pyrénées, among others).

Festivals in transition

The economic crisis has had a varying effect on festivals. Even if this year has shown decreasing public funding of the cultural sector, festivals have not been more affected than others in this sphere. The so-called "crisis" sometimes serves as a pretext for subsidy decreases when other reasons are the real cause (political disagreement, a weakening of the festival team, a shrinking audience, etc.). If some festivals have closed between 2008 and 2012, particularly those for modern music (Skabazac, Chapiteuf), others have continued to receive a constant or increasing amount of public funding. It is thus impossible to identify the specific effects of the crisis on French festivals. Several reasons explain this situation.

First, we can look to how French cultural supply is structured. French festivals are embedded in a cultural context already very rich in other cultural offerings and well-equipped with permanent venues, both of which readily find receptive audiences. This is advantageous for festivals, though it could appear to sharpen competition. The national focus on cultural democratization and the devolution of power carries with it the understanding that public authorities do not have sufficient means to realize all their objectives. This situation has opened the way to private initiatives and forced festivals to innovate, constantly renewing their projects and work methods.

Second, festivals display a high degree of flexibility in terms of their artistic project, their program, and their organization. This is one of the advantages of the status of "association" which characterizes 88% of French festivals. This organizational model allows festivals to receive different subsidies while engaging in non-profit commercial activity. The association allows an organization to hire salaried employees, to contract with service providers, and to supervise volunteer workers. In terms of management, this flexibility gives festivals the ability to compensate rapidly for temporary income loss, especially by limiting payroll expenses and taking on more volunteers. Another

example of this flexibility can be seen in how a festival pursues its objectives. Generally, festival objectives are artistic, territorial, and cultural in nature, but a festival team is free to decide for itself how to combine these three factors. Indeed, public policy objectives are sometimes distributed among different festival teams. Here, we can also mention the economic impact festivals can have within their territory. On average, 1€ of public funding equates to an economic contribution of 7€ per festival (Négrier, Djakouane, & Jourda 2010).

Figure 6. Festival personnel (comparison of national averages)

Personnel status	France	Europe	Quebec
Total number of employees	**66**	**56**	**83**
Salaried employees	37	21	55
Freelance	17	12	17
Interns	3	2	2
Personnel supplied from other organizations	9	21	9
Volunteer workers	**83**	**123**	**102**
Volunteers/Total personnel	51%	53%	64%
Total personnel	**149**	**179**	**185**

Third, festivals have met with a great of success in terms of audiences. Despite the repeatedly low rate of democratization in the sphere of French cultural practices (Donnat 2009), this success underscores the ability of French festivals to attract new audience members. Few scientific studies exist on festival audiences. Outside of specialized monographs (Ethis 2002), our 2008 research – which applied the same methods to 49 music and dance festivals – has allowed us to provide a more general analysis of audiences (Négrier, Djakouane, & Jourda 2010). This research shows that festivals can be used as a tool for broadening audiences and for cultural democratization. Nevertheless, if festivals promote diversity in audience members and their tastes, they do not provide a long-term solution to problems of inequity in cultural accessibility. The main factors contributing to broadening the range of audience members are the following: using different venues, mixing musical genres, and providing affordable ticket prices. Not all festivals display the same strengths and weaknesses in this regard. However, choices in musical programming have the biggest impact on the social background of audience members, independently of free admissions policies which require a much more sensitive analysis. We have shown that the latter is not always the most effective weapon in the fight against structural inequalities in the cultural sector.

The significance of finances

A festival's success with the public does not protect it against looming financial difficulties. We have seen the extent to which municipal and especially

regional authorities wish to assist festivals within their territory as well as to contribute to their national and international visibility. However, one can wonder whether this financial support is enough to compensate for the continuing withdrawal of state or local authorities funds. As we saw in Part 1, festivals have cited this as one of the main issues with which they currently grapple.

The budgets of French festivals appear to be much higher than those of their European counterparts. This is one of the specific features of the French cultural model and is particularly visible in the importance of public funding, especially by regional and local authorities (figure 5). The high proportion of public funds relative to the total festival budget both offers financial stability to festivals and makes them financially dependent on governmental support. Nevertheless, the average festival budget increased by 13% over the 2008-2012 period. This is much higher than the European averages which include negative changes.

There is a commonly accepted notion that the financing of cultural policies in France comes mostly from the public sector. However, a closer look at festival resources shows points of convergence with the European sample. It is true that the subsidy rate is slightly higher than the European average, but the sources of these subsidies are distributed differently (figure 7). Patronage and sponsoring have remained stable despite tax incentives and the various festival strategies to attract financing. In France, the funding models vary according to musical style. Rock/pop festivals rely more heavily on ticket sales while jazz has a higher rate of festival-generated income. Classical music and world music festivals appear to rely more directly on public funding.

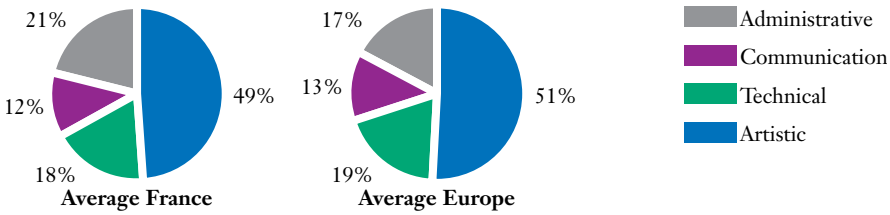
Figure 7. French and European distribution of income sources (%)

Income sources		French average	European average
Ticketing		27%	28%
Festival-generated income		18%	14%
Patronage/Sponsoring		8%	12%
Subsidies		47%	45%
	Local	28%	21%
	Regional	14%	17%
	State	4%	6%
	European Union	1%	1%

These different funding models show that several different festival economies coexist. The only common denominator can be found in the joint effort by different government levels to provide festival funding. Specific differences

in this model can be attributed to a public funding strategy that depends on each government level counterbalancing the others. This can be seen in how festival expenses are distributed. Balancing different funding sources provides a solid framework for French festival activity. Indeed, festivals are keeping in line with national public policies by taking into account two major priorities: providing support to artists and professionalizing the sector. The higher administrative costs of festivals reveal the latter priority, even if volunteer workers play an important role in running a festival.

Figure 8. French and European distribution of expenses (%)



The balance between artistic and employment priorities is roughly consistent for all musical genres. Only world music festivals show a lower percentage of administrative expenses. This is due to the size of their technical expenses, especially for equipping sites not prepared for musical concerts.

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Until the present moment, the "French" model has seemed to withstand the economic crisis in Europe, even if variations can be seen between different types of events. In a country with a high number of cultural venues, the growing festival presence in the cultural sector is closely linked to partnership opportunities. On the level of individual festivals, partnerships can offer new funding sources, increased administrative sophistication, and outside contracting possibilities. They also create possibilities for festivals to act together within their territories and on the national and European scale.

Music Festivals in Hungary

János Zoltán Szabó

Festivals are essential to Hungarian culture today. They can be defined as periodic and themed celebrations established within the framework of ritual events and reflecting the identity, basic values, and world view of a community.[1] However, the freedom to organize, to participate in, or to support a festival has not always been so accessible over the course of the last eighty years. The major milestones marking the development of music festivals are the establishment of the first arts festival, the *Szeged Open Air Festival* (1931), *The First Hungarian Pop Festival* (1973), and finally the largest postmodern festival, *The Sziget Festival* (1993).

In today's festivals, a diversity of art forms and events flourish simultaneously. Traditional arts festivals play conventional or conformist classical or jazz music, while Woodstock-style youth festivals showcase new conformist rock and alternative music, and heritage reconstructionist festivals[2] (Pusztai 2003) incorporate a plurality of art forms. There are also avant-garde festivals using non-conformist contemporary arts. A festival's managerial model and its cultural effects are linked to how it positions itself relative to conformist models. For-profit festivals are usually dedicated to new conformist rock and are both more recent and inherited from the Kádár era[3] (1956-1989), while other festival forms regularly incorporate the locality as an owner or stakeholder. Conformist art festivals are frequently organized by the public sector, while heritage recontructionist festivals are usually nonprofit NGOs.

Cultural policies and the growth of festival associations have both made great strides in the last decade. Policy-makers and the National Cultural Fund

1. This notion is based on the work of Alessandro Falassi (1987: 2, 1997: 296).

2. The terms old conformist, new conformist, non-conformist, and heritage reconstructionist are categories closely tied to Hungarian history, particularly its communist past. A festival or mode of musical expression that is conformist tends to reinforce political power, while new conformist and non-conformist refer to those that favor expressive freedom and will be explained later in this chapter. The category heritage reconstructionist designates festivals renewing, remaking, reimagining, or "reconstructing" a tradition or cultural heritage. For example, this category of festival refers to events that draw upon folk traditions or music as well as those that create new heritage often using well-known elements of local cultural memory.

3. János Kádár was a Communist leader and the General Secretary of the Hungarian Socialist Workers' Party (HSWP) from 1956 until 1988. His right hand in cultural policy was György Aczél, a member of the Political Committee of the HSWP (1970–1988) which oversaw the cultural life of Kádár's Hungary.

(NCF)[1] have recognized the growing importance of festivals by creating a specific funding scheme for them in 2004, which is available in different forms. Today, a specific board is responsible for exceptional events and cultural festivals within NCF. The overall importance of art festivals in cultural policy – and more generally in urban development, rehabilitation, and tourism – is globally understood. However, some private for-profit organizations like the *Sziget* festival fall outside the scope of cultural policy because of their extraordinarily large audiences. The *Sziget*, for example, is considered to be more within the sphere of show business or entertainment since its budget is greater than the entire festival grant budget of the National Cultural Fund. It thus relates more to tourism and city policy. A 2013 example of how the *Sziget* and the city of Budapest cooperate can be seen when the Sziget Eye (a 65-meter Ferris wheel) was set up in the city center for six weeks before moving into the *Sziget* festival itself.

On a practical level, public funding from the NCF is distributed, by order of amount, to conformist festivals, then to heritage reconstructionist and contemporary music festivals. Among the 57 festivals held between May and December and receiving public support from the National Cultural Fund, 39 were identified as conformist, 8 were heritage reconstructionist, with the remaining 10 evenly divided between new conformist and non-conformist festivals. The present study has also identified the artistic merit of a festival, its effectiveness, and its geographic location as important variables. As these factors are not always well represented in festivals, it is necessary to weigh their relative importance when classifying events. For example, the *Haydn Festival* in Eszterháza (northwest Hungary) is of very high artistic quality and possesses a relatively large budget, whereas the audience size is very limited and the venue represents an important part of Hungary's cultural heritage. In terms of geography, there are also festivals organized in rural areas, such as the Ördögkatlan Festival in southern Hungary or the *Zemplén Festival* in northeastern Hungary.

A unique history

The roots of modern Hungarian festival culture can be traced back to the nation-building of the 1920s and 1930s. This bears similarities to the relationship between German unification and Wagner's *Bayreuth Festival* in 1876. The first classical arts festival, the *Szeged Open-Air Festival* (1931), which hosted performances in musical theatre and opera, was initiated by intellectuals and journalists living in Szeged. The concept of the festival was embedded in the

1. The National Cultural Fund is the primary instrument for the government to finance activities within the cultural sector. It is administered by the Ministry of Cultural Heritage which in turn names the 11 members of its board and its president.

cultural policy spearheaded by Klébersberg Kúnó (minister of the Interior and minister of Culture, 1921-31) in the period between the two world wars. It was associated with the completion of the Votive Church of Szeged, which has been the festival site since its origins. This period of classical music festivals lasted until World War II and is exemplified by the *Budapest Summer Festival* (1938), among others. These conventional events were the first Hungarian festivals that placed the artistic program (containing mostly music and theatre) at the heart of the festival concept.

After World War II, the rate of festival creation slowed to halt, mainly for political reasons. Freedom of expression was being curbed in Hungary, and cities were no longer allowed to organize new arts festivals or city festivals as such. Likewise, it was impossible to establish festival associations on a national or international level like the European Festivals Association (1950). Rather, there were state-organized competitions and festivals that were broadcast on the radio, such as *Let Us Choose!* (*Tessék választani!)* and from the 1960s through the 1980s, *Made in Hungary*, or on television, like the *Dance Song Festivals* (1966-1972). On the municipal level, only choir festivals, arts festivals associated with secondary schools, and similar competitions were usually allowed to be organized.

This system of competitions and broadcasts could be controlled by party officials, but it also led to the special star system of the Kádár era. In the context of union-organized holidays, conformist art festivals were established to provide summer vacationing opportunities for the working class. On the international level, there was the *International Youth Festival*, often called the *Festival of Youth and Students*. There were 14 seasons organized between 1947 and 2005, and these represented the only occasion where preeminent youth from the Socialist Block's educational system could meet, most often in a country with a lack of democratic processes. Surprisingly, this period of state-controlled events and broadcasts met the needs of the youth, the same individuals who wore jeans as a sign of protest against their parents' cultural heritage. Indeed, this star system co-opted potentially rebellious youth behavior, transforming it into indirect resistance to the state.

Though all recording studios and broadcasting stations were under the control of the state, this was also the era of the early Beatles, and youngsters could feel the common power of being together. Beat music groups such as Bergendy, Metro, Illés, or Omega performed on TV programs (mostly competitions) and became extraordinarily famous, attracting large crowds of young people to clubs and concerts. Some of the famous sites were the Metro Club or Buda Youth Park. The generation that grew up with music groups founded in the 1950s and 1960s often called themselves the "Great

Generation." Later generations could not assume such a label because of the fragmentation of music fans into different segments during the 1970s. Besides the rock movement, the 1970s was characterized by the spread of dance house (folk dance) and folk festivals as well.

The non-conformist, countercultural, youth-driven, sexual revolutions of the late 1960s introduced a new style of festival usually modeled after the Woodstock Festival (1968) and still an inspiration for the youth festivals of today. The first rock music festival was called *The First Hungarian Pop Festival*, organized in Miskolc in the Diósgyőr Stadium in 1973. Miskolc was an acceptable site for this festival because it was geographically far enough away from Budapest to stifle news and keep possible scandals quiet. Festivals were more frequently permitted in the 1970's – but again in a controlled way. This control was based on the policy of the three T's: Tűr, Tilt, Támogat (the English equivalents being Prohibit, Forbear, Support). In the case of festival policy, this meant control and delay – control the event with recruited agents and delay the licensing process. Furthermore, the ruling party youth organizations or state operators organized their own festivals to counter these cultural expressions. One of the "counter" festivals, the *Solidarity Rock Festival*, was organized in 1976 in a commercial zone of the Budapest International Fair and included artists and friends of the party.

In the 1970s, two major radical rock groups (Beatrice and P. Mobil) were unable to release a single record[1] but attracted thousands of people to their live performances. One of their competitors, the rock group Dinamit (1979-81), was made up of recruited agents, a fact that was only recently revealed. Festivals and concerts were clearly considered to be activities organized by the political opposition, regardless of the fact that these music groups simply wanted to entertain the younger generation more freely. This generation of festival-goer was often called a rocker, a punk, or more specifically *csöves*.[2] Soft police attacks (identity checks, interrogations, beatings in the police station) were the usual practice against rock festival visitors and artists, but an open and total attack did not happen until 1984. This year – such an irony! – the international *Pusztavacs Peace Festival*, its venue symbolically in the geographical center of the country, was totally overrun by the police. No news came to light about this until 1989/1990.

In the 1980s, other music groups like the Hobo Blues Band and Edda – who understood the official approach – tried to sneak past the Chanson Committee

1. The lyrics were usually prohibited by the "Chanson Committee," a body set up by the state to censor potentially subversive material.

2. Csöves literally means "tube-like" and, by extension, "living in a tube" or being "homeless".

by playing their recorded songs with different lyrics during concerts. Owing to this process, rock music became considered as a more and more conformist musical style – even to the point of being performed on TV. It may have been conformist, but since it was different from the old conformist style, the label "new conformist" is more appropriate. This decade is also well known for festivals involving professional artists in the fields of live theatre and music competitions: the *National Theatre Meeting* (Országos Színházi Találkozó, 1981) or the *International Bartók Seminar and Festival* (1985). Cities could also start developing their image by establishing municipal festivals such as the *Budapest Spring Festival* (1984).

The first private festival was organized at Sitke in 1986, after *perestroika* and *glasnost* were introduced by Soviet president Gorbachev. In the late 1980s and early 1990s, a new music movement broke to surface: alternative music and bands like Nirvana, Pearl Jam, REM, or the Cure. The largest private festival, *The Sziget Festival*, began in 1993 as a place for alternative music, used a symbolic slogan appealing to youth (we "*need to spend a week together*"), and chose a symbolic venue: Óbuda Island (the site of a festival called *Black Sheep* and an alternative festival *Goodbye Iván*, both in 1991). Over the course of the 1990s, the *Sziget* became the largest Woodstock-style rock festival.

The first festival putting various art forms on stage was probably *The Valley of Arts* (1989) in Kapolcs, originally a completely unknown site which was subsequently made famous by the festival. Although both festivals, *The Valley of Arts* and the *Sziget*, incorporate various art forms in their program, there are significant differences between them. The *Sziget* is an international festival with all its associated problems – the loss of national visitors and the difficulties of the star system. *The Valley of Arts*, however, has a markedly national character (folk art) and always includes innovative art initiatives in its program (especially the fusion of different genres). These two festivals have often been analyzed and compared by sociologists. Over the last decade, survey results have shown that the *Sziget* draws its audience members from the middle class, in particular those who have been frequenting the festival since they were young. *The Valley of Arts*, besides having more art-friendly myths, is multi-generational and tends to attract intellectuals.

Festival financing

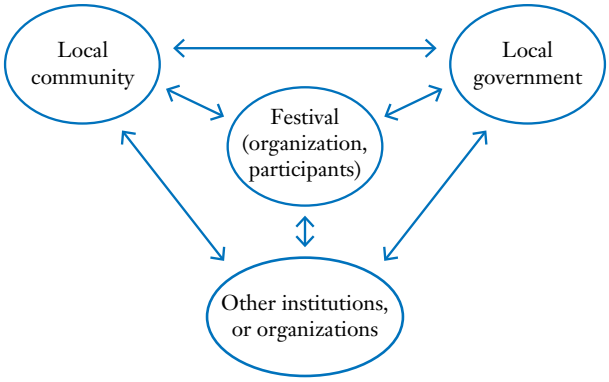
International festival surveys mostly focus on the local socio-economic environment, intersectoral cooperation, synergies with tourism, and culture-based urban development. In Hungary, leisure time and free time statistics, cultural consumption surveys, especially the *Magyarország kulturális állapota* (Cultural State of Hungary, Vitányi 2006) surveys and youth studies

(Gábor et al. 2004, Bauer et al. 2001) were key to recognizing the emerging importance of festivals. A fair number of festival researchers have analyzed the social functions of festivals on the basis of work done by Matarasso (1997). There are different typologies used within the various academic disciplines intersecting with festivals. Research carried about by the author has led to the creation of a structured model of the societal functions of festivals. This incorporates work being in done in the most pertinent fields (policy, history, cultural anthropology, education, sociology, cultural studies). In this model, the artistic, political, and community-centered functions are distinguished as three main domains. These are not mutually exclusive but do provide a framework for the analysis of specific festival policies and practices.

In the field research for this study, a total of 57 festival organizers, all receiving financial support in 2007 from the National Cultural Fund, were surveyed. Additionally, 10 Hungarian theater festival organizers were also surveyed in 2009. The first component of this research was to investigate the socialization processes taking place during festivals. This involved questions of cultural conformity, community and social networking, and learning processes. The second component was to explore the social functions of the festivals receiving financial support and their relationship to the original territorial goals when these festivals applied for funding. These goals included expanding cultural access to disadvantaged members of the community or region and the economic impact of festivals. The research findings can be summarized as follows:

1. With respect to socialization processes and cultural conformity, this research focused on how festivals were embedded within the community and their cultural context. It also analyzed the learning opportunities set into place by festival organizers.
— Cultural embeddedness was understood in terms of cultural conformity as indicated by seven variables: name, symbols, artistic genre, autonomy of the organizers, the festival concept, its mediated values, and functions. Using these seven variables, the following festival typology was set up: old conformist, new conformist, nonconformist, and innovative festivals.
— Community embeddedness was indicated by the level of volunteer participation and the relationship to local governments, local sponsors, and to both tangible and intangible heritage. The critical factor was the involvement of local service providers.
— The learning opportunities set up by festival organizers were analyzed in terms of the following educational fields: artistic education, professional development, and value protection. The last field is the one most explicitly associated with learning opportunities.

Figure 1. The embeddedness of a festival



Both the survey and the field research indicates that the cultural embeddedness of an event defines the content of the learning processes and the festival message. Community embeddedness, on the other hand, ensures the social conditions of the learning process. Certain learning opportunities could be found both on a personal and organizational level, but also on formal, non-formal and informal levels. One-third of the festivals studied had the necessary embeddedness to offer learning opportunities which were consciously set into place by festival organizers. Two-thirds of the festivals can be understood as catalysts for further autonomous learning about the arts.

2. Regarding hidden considerations for allocating grants, the research tracked the National Cultural Fund's festival support practices. We have observed the following:
— The advantage of old conformist and heritage reconstructionist festivals,
— The advantage of education as a secondary goal,
— The importance of expanding access to underprivileged visitors,
— Distributing grants in a geographically balanced manner,
— The advantage of festivals with longer seasons and bigger than average budgets and audiences,
— The advantage of theatrical and classical music festivals over folk art festivals,
— Economic efficiency (reaching more people with lower expenses),
— Conflict of interests: local governments prefer tourist festivals (political function), the National Cultural Fund prefers artistic festivals (artistic function).

The results were disappointing with regard to the problem-solving skills of festival organizers. All the problems identified in our first festival survey (Hunyadi – Inkei – Szabó 2006) were still unresolved.

Recent political discourse usually focuses on festivals as exceptional events with artistic, community, and political importance – as demonstrated during our analysis of hidden objectives. Detailed objectives are still rather obscure, even to the point of approaching myths the closer one gets to the local policy level. Regarding the budgets, we can use data from the National Cultural Fund as well as from festivals in 2004 (230 festivals) and 2007 (57 festivals) to make the following estimates. Public funding in 2007 represents around 3-4% of the total amount of public cultural budgets, though public financial aid to festivals does not always come from the cultural budget. With respect to the economic crisis, local budgets have been significantly cut, but funding from the central government has been maintained at the same level for all festival types, regardless of musical genre. The National Cultural Fund provides annual support for 70 – 90 cultural festivals, while the budgets of smaller festivals are based on local funding and are probably more affected by the crisis. A regulatory framework for festivals has not yet been accepted, but regulations concerning outdoor spaces affect festival organizers in more technical ways. Festival sponsorship is usually based on the festival's commercial value. For example, the amount of beer sold at the *Valley of Arts* festival is an indicator for the number of its visitors. Generally, the larger the festival, the more sponsorship it can attract.

The registration and rating system

Much like Local Festivities (*Lokale Festiviteiten*) or Virtual Festivals[1], Hungarian festival associations have decided to establish a festival registration and rating system. This joint project was begun in 2008 by the five leading national festival unions:

— The Federation of Hungarian Art Festivals – Magyar Művészeti Fesztiválok Szövetsége;
— The Federation of Hungarian Festivals of Gastronomy Gasztrofeszt – Magyarországi Gasztronómiai Fesztiválok Szövetsége;
— The Hungarian Federation of Folk Festivals CIOFF Hungary – Folklórfesztiválok Magyarországi Szövetsége CIOFF Hungary;
— The Hungarian Festival Association – Magyar Fesztivál Szövetség;
— The Hungarian Union of Open-Air Theaters – Szabadtéri Színházak Szövetsége.

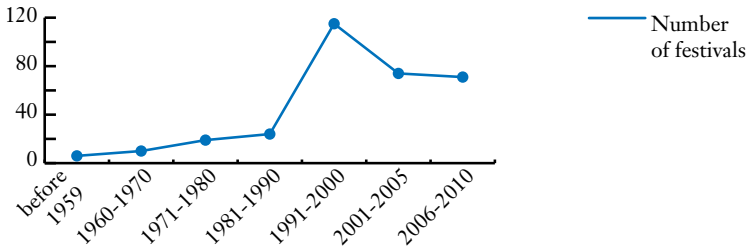
The first phase of activity began with the registration of existing festivals in order to create a database. Since then, 319 festivals have been registered in this database, 204 of which were identified by the organizers as art festivals. In the second phase, a rating system was established in 2009. Registration is voluntary, free of charge, and automatic, but a request for an evaluation must be

1. www.virtualfestivals.com.

approved by the Board. The rating system is also voluntary, though interested festivals must pay a fee. Usually, 2 or 3 monitors visit the festival to administer an assessment based on a complex grading scale. Today there are 104 qualified festivals on the list.[2] The title of *Outstanding Festival* is followed by less prestigious levels (*Good*, or simply *Qualified*) and accompanied by a generic label (*Arts*, *Folklore*, *Gastronomy*, or *Non-Applicable* for festivals that are difficult to label). Although budget cuts have affected the festival registration and rating process, it is being continued, as promised by the project website.

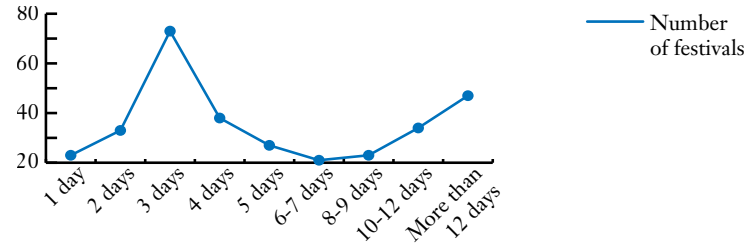
According to the festival registration statistics, the 319 festivals registered between 2008 and 2011 have attracted 7.14 million visitors per year, but only 20% of the visitors paid for the tickets, with 80% enjoying the festival atmosphere for free. Regarding festival administration, most of the festival directors (70%) work with art experts to develop the festival program. 45% of the festivals take place exclusively outdoors, while 43% take place primarily within buildings. The remaining 12% have mixed venues. As indicated earlier, the festival boom reached Hungary in the 1990s, and this dynamic remains strong.

Figure 2. Festival creation by year (319 festivals)



Regarding the length of the festival, 45% of the festivals take place over the course of 2 to 4 days. 15% of the festivals have scheduled more than 12 days of programmed events.

Figure 3. Length of festivals (number of days of festival activity)



2. www.fesztivalregisztracio.hu.

In terms of the artistic orientation of the sample festivals, the majority (64%) focus principally on the arts within a professional sphere, the second largest group is dedicated to the culinary arts (16%), followed by festivals showcasing amateur artists (6%) and others (14%).

Figure 4. Distribution of festivals by artistic genre (Sample size = 319)

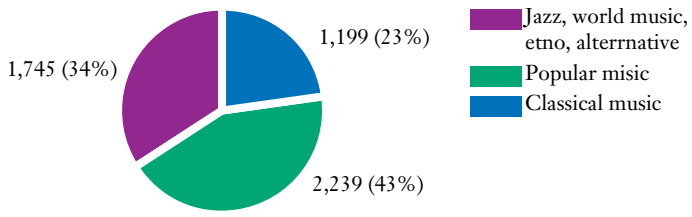
Artistic Domain		# of events programmed by festivals	# of professional artists	# of amateur artists
Classical music		1,199	784	415
	traditional classical music	674	424	250
	historic/religious music	372	253	119
	contemporary/ experimental	153	107	46
Popular music		2,239	1,511	728
Jazz, world music, ethnic music, alternative		1,745	1,294	451
Theater		1,779	1,434	345
	drama	1,006	777	229
	opera	40	37	3
	operetta	71	65	6
	musical	211	161	50
	uppet	451	394	57
Dance		1,294	554	740
Literature		340	244	96
Fine and applied arts exhibitions		1,045	787	258
Film, video, multimedia		2,265	1,619	646
Folk		1,931	622	1,309
Circus		138	121	17
Other arts		955	498	457
Total		**14,930**	**13,580**	**8,599**

Music festivals represent a considerable 18% share of the total number of festivals. This group can be divided into three main subgroups by the number and genre of programmed events: popular music, jazz/world/ethnic music, and classical music.

Regarding finances, data collected through festival registration provides us with a picture of festival budgets at the close of the last financial year. Depending on the periodicity of different festivals, this could mean either

2010 or 2011. The total income of the 319 registered festivals was some 75.7 million euros. Going deeper, one can see that European funds play only a modest role in Hungarian festival life (0.3% of their income, including non-European sources). With regard to national grants, the central government's budgets are remarkable when compared to local governmental support. Central public bodies spent twice as much (18.5%) on festivals than local public budgets (9.2%), while all public financing taken together provides accounts for barely more than one quarter of festival budgets.

Figure 5. Music festival events by genre



Ticketing, advertising, and sponsorship are all considered as the commercial activities of festivals. Ticketing provides a reasonable share of festival income (22.9%). Advertising (7%) and sponsorship (4.5%) together provide less than one-third of commercial revenue.

Figure 6. Festival income sources during their most recent season (%)
(319 festivals, 2010 or 2011 season)

Ticketing	22.9
Commercial income	7
Other sources of festival-generated income	35.8
National Cultural Fund	5.5
Other state support	13
Local government	9.2
Sponsoring	4.5
Europe, International	0.3
Other sources of income	1.8

Altogether, one quarter of the income is from public bodies, while another third comes from commercial activities. What accounts for the remaining income, then? According to our diagram, festival-generated income makes up the difference. The question then arises as to how festival organizers can raise 37.7% of their budget from festival-related income. Some would argue that festivals are still not transparent in their financial operations. On a

case-by-case basis, there are thousands of possible answers to these questions; however, they usually touch upon two main issues:
— When applying for funds, festival organizers are forced to demonstrate rising budgets. Therefore, they add income that is only indirectly related to the festival (e.g. yearly income of a continuously operating organization).
— Commercial income is sometimes misunderstood. For example, vendors usually pay a fee to have access to a festival but this is often improperly categorized as other income.

Unfortunately, these festival statistics do not contain segmented data on budgets for different music styles.

The place of festivals in cultural life

In Hungarian festival culture, the *raison d'être* of festivals is basically artistic, community-based, and political in nature. Economic considerations are more based on myths and misunderstandings. From a scientific standpoint, festivals are above all else social and human experiences. After the budget cuts of the last decade, cultural funding was shifted from institutional financing to project- and event-based financing. This is the prevailing practice on the municipal level. An additional advantage of the festival format is that they can access funding from other public sources and are not limited to public cultural budgets. As a result, cities can use festivals to put their name on the cultural map, to build their reputation, to bolster tourism, and to develop the local economy.[1] Villages and other small places have recognized the need of their community for celebrations and usually allocate funds for two or three cultural events over the course of the year, festivals being among these.

Concerning art festivals, the involvement of intellectuals and the creation of local initiatives are central to developing new festivals. One of the most pertinent examples is the *Bartók+ Opera Festival* in Miskolc, a city in a rural part of northeastern Hungary with no remarkable background in opera. The mayor's rationale for developing this event was financial in nature: events costs less than financing an institution would, but they attract investor interest. Likewise, one can see that festivals can play a key role in local economic development, but festivals are still surrounded by many misunderstandings and myths.

To sum up, political players use festivals to position their city, and these events serve as arguments in favor of tourism, urban rehabilitation, and investment. Furthermore, festivals are considered as a way for municipalities to avoid

1. For example, Mercedes took into account the cultural life of the city of Kecskemét (close to the geographical center of Hungary) before investing in a new factory there.

institutional overspending. On the local level, reinforcing the cultural community and local identity are strong reasons for developing festival activity. Moreover, festivals provide a space for free expression and serve as indicators of civic freedom, though Hungarian society as a whole has become more passive in democratic processes in the last two decades. At the very least, free admissions policies help people to participate in cultural events, making festivals ever more popular. As we noted earlier, data from festival registration shows that 80% of the estimated 7.1 million annual festival visits were free. The world music festival *Vidor Festival* (Nyíregyháza, east-central Hungary) had difficulty selling tickets for scheduled performances and concerts. Therefore, they decided to focus on increasing audience sizes through free admissions and turned away from box-office receipts in favor of sponsorship. This has become an increasing practice in rural and poor areas. Finally, sustainable development is not highly visible in Hungarian festivals, although it is considered in one of the evaluation questions in the festival rating system.

In terms of the geographic distribution of Hungarian festivals, this appears to be fairly well balanced. Regarding the seasons, most festivals are held in July and partly in June and August. The dominant festival types are new conformist rock, organized by for-profit companies, and heritage reconstructionist/conformist festivals, organized by non-profit NGOs. The festival presence during other seasons is dominated by other disciplines, notably the culinary arts, with agricultural or wine festivals held during September and October.

Recent developments underpin the emerging role of festivals in social life. As shown in this article, festivals are cultural phenomena that also function as a kind of indicator: an indicator not just for culture and conformity but also for community and political will. This is why it is this author's belief that researchers must pay more attention to the societal role of festivals.

For a Taxonomy of Festivals in Italy
The Five W's of Festivals:
Who, What, When, Where, and Why

"The festival: an extraordinary event in an extraordinary place, in an extraordinary moment."
Richard Wagner

Luca Dal Pozzolo & Luisella Carnelli

In terms of festivals, Italy once again proves itself to be the country "of a thousand towers." According to various estimates, over 1,600 events and more than 1,200 festivals are organized each year. These figures show in particular how vital many of the mid-sized, small, and even smaller urban centers are in the festival landscape and how our local cultural operators are always ready to create new, ambitious, and innovative "cultural adventures." On the other hand, the same data indicates how problems can arise from this. Festival organizers face difficulties in scheduling event calendars, and policy makers must determine how to make resources available with a minimum of waste, especially during these times of crisis and "spending reviews."

It should also be noted that, in Italy, there is no shared taxonomy in the field of festivals. This would offer the possibility of structuring and classifying festival-related knowledge, first in order to "define a disciplinary approach that [would] clarify chaotic situations" (Guerzoni 2008), but second, to create a theoretical framework for the festival phenomenon: "(…) If abroad, from the 1980s to the 21st century, festivals have been considered as essential elements – indeed building blocks – of "*cultural heritage*" in the English-speaking world or "*patrimoine culturel*" in the French, in Italy the road to even partial recognition of this importance has been very long, and even today, this long sought-after goal hasn't yet been achieved" (Guerzoni 2012).

In Italy, the very concept of cultural heritage and cultural activity gained legal recognition only with the "Bassanini 1" legislative decree 12/1998, which defines cultural assets as "those that make up the historic, artistic, monumental, archeological, or literary heritage as well as others that memorialize a civilization's value." [1] It goes on to define cultural activities as those which are meant to "develop and share artistic and cultural expressions."[2] Theater, music, and cinematography are usually labeled as "entertainment."

1. Article 148, section 1a.

2. Article 148, section 1f.

In spite of the difficulties festivals encountered in being officially recognized as "cultural assets," this change came about on its own, establishing *de facto* what had been ignored or misinterpreted *de jure*. Originally, the festival tradition in Italy began in the mid 1950s, while in the last decade it has shown so much growth that experts have been calling it a phenomenon of "festivalization."

Today, there are many cultural dimensions that must be taken into account in order to understand the reasons for and roots of the festival phenomenon in Italy. What are the real needs of the public, for example, and what are the new formats and new means of communication for festivals? Also, there is the fact that the "festival formula" is becoming more and more widespread. It is appreciated for many of its advantages: the concentrated use of space and time; the live shows; the power to create new ties and redefine the identities of entire cities, territories and social structures; and the ability to combine culture, leisure, and entertainment. Indeed, festivals offers broad learning opportunities, not only for a small cultural elite, but also for those with a more general need for knowledge that is not satisfied by traditional cultural institutions.

A short historical journey

There is currently no precise festival taxonomy in Italy, besides intuitive distinctions in genre (music, theatre, cinema, multidisciplinary, and cultural festivals). There is no precise definition in terms of festival sites, characteristics, connotations, and other distinctive elements shared between operators, artists and organizers as well as policy makers, both inside and outside of the academic world. What goes on inside the festival world, at least in Italy, seems very "protean" and shifting as well as innovative in terms of artistic creativity, management and organizational models, and the identification of new partnerships with the territorial, cultural and social spheres. In other words, one could say that Italian festivals are like "animals" with a strong spirit, pliable and protean while capable of exploring, consciously or not, new and innovative expressive models. This is also possible because of an absence of restrictions in terms of management formats, offering festivals the chance to identify the best solutions for their specific cultural, geographical, and practical needs.

Italian festivals began in the 1950s specifically with the *Venice Biennale* and the *Maggio Musicale Fiorentino*. As a matter of fact, the term "festival" – an English interpretation of the Latin term[3] – has a long history beckoning back to the "feasts" of Baroque and Renaissance tradition and even further to the ancient Greek rituals in honor of Dionysius. These were religious manifes-

3. From the Latin adjective festivalis, derived from the classical Latin festivus (festive, proper for a feast, with pleasure, fun) and from its related form festivitas, originally a term used to indicate joy, grace, courteousness, which in the post-classical period took the meaning of festivity and feast.

tations where the physical setting and the emotional involvement of a large number of participants would coincide with the essence of the artistic event (Zocaro 2007). Nevertheless, in time, the term "festival" came to be defined at a national level as an event that would involve "a diversity of shows […] within a coherent cultural project, taking place in a limited time frame and in a distinct setting" (Gallina 2001).

Their relationship with the territory, the confrontation of various artistic experiences from different parts of Italy, and their capability of grasping new artistic trends and sharing them through collective participation represent the main factors for the success of festivals in Italy. Another interesting element regarding Italian festivals is their strong tie with both the art world and the natural environment which, in the 1970s, brought to life some of the most important festivals in Italian cultural life over the past 40 years.

Trends in new international festivals: innovation, experimentation, research, and blending the arts

The festivals developed during post-war Italy have quite an interesting pedigree. Two internationally famous vanguard festivals, Avignon and Edinburgh, paved the way for some of the most prestigious international festivals in Italy, ranging from the *Venice Biennale* and the *Festival of Spoleto* to the *Puccini Festival* in Torre del Lago. These festivals are characterized by their vibrant artistic vision, their focus on research and experimentation both nationally and internationally, their concentration on the performing arts, and an approach which is more often multi- or trans-disciplinary than mono-genre.

Though these festivals are nationally and internationally recognized for their innovative programs, their distinct element is to create synergetic bonds with their territories. It is not by chance that Giancarlo Menotti chose Spoleto after searching throughout Italy for a special town capable of being transformed into a natural open-air theater.

The strong bond between a festival and its artistic milieu, as well as the synergy it created with its natural environment, led to a stronger commitment on the part of participating artists. These artists were often called upon to create site-specific shows or to take into account the various artistic peculiarities of the festival locales. This artistic involvement in the festival organization can be seen in terms of the transformation or transfiguration of the small towns hosting the festivals. These towns became actual festival-towns whose names were associated with the festival itself. Experimentation (in terms of music, theater, dance, etc.) and artistic excellence, fascinating environments and a strong human dimension, these appear to be the distinctive elements positively defining the festival experiences begun in the 1950s and developed

throughout the 1970s. There were, of course, variations in larger urban settings, but these were part of a larger dynamic encouraging innovation.

The phenomenon of festivalization: a paradigm change

Beginning in the early 1990s, the Italian cultural sector grew rapidly. Each year has seen the creation of new festivals, often set in unique and unusual spaces, which offer innovative and unconventional performances that are often evocative stories brought to the stage. What defines this blooming of festivals throughout the country, this so-called "festivalization," is, on the one hand, a new organization model that explicitly recalls the tradition of feast and celebration, while on the other, a stronger thematic focus within the festivals.

Lately, there has been a noticeable increase in these thematic cultural festivals, where the audience searches for in-depth analysis in addition to the value of the experience itself and the transmission of knowledge. Cultural festivals in Italy, often improperly associated with fairs, pageants, contests, or exhibitions, have grown rapidly over the past 15 years (since 1997, with the launch of the *Festivaletteratura* in Mantua), though at a slightly lower rate than in the rest of Europe.

Guy Debord's pioneering vision (dating back 40 years) of a "widespread spectacle" has now been realized, and this pervasively conditions private life and social behavior. We can think of models of consumption and use of time or information as both a dynamic and a representation of power. The event could therefore exercise a crucial role in facilitating cultural processes. Everything tends toward becoming an event – shoe-store openings, art exhibits, electoral conventions, reality TV or the presentation of yearly wine collection – because everything must be represented (and be self-represented) as a place for potential "experiences."

The "entertainment society" could only produce the "economy of the experience," sustaining itself by creating and devouring events, because the event is the sphere in which different relations come together and experiences pile up much like the material goods of this new social, cultural and economic scenario. The protagonist and privileged beneficiary of these exchanges is the "consumer of experiences," which can be equated to the postmodern and urban *flâneur* of the 19th century. They are thrill-seekers, open and curious, inclined towards immediate gratification, fascination and seduction.

Of course, this is not the only type of audience member. Another large social group present on the festival scene can be defined by its new way of using events and its desire for cultural fruition, eschewing the concept of cultural consumption in favor of "cultural investment." These people choose to

participate in cultural events as a chance to define a coherent identity and a personal strategy for self-realization. This requires an open-minded approach to the future and is not limited to obliteration and fulfillment in the present. It is an investment in which every chance for personal fulfillment becomes a piece of the puzzle, a step further on a path toward cultural or spiritual enrichment or simply in search of a better balance with oneself and with others.

All these elements are important in how cultural events are now organized. They pay close attention to important topics (economy, democracy, science, etc.) and grapple with issues ranging from ethics and morality to literature and economy, even addressing the great existential queries of the human condition. This is a type of festival in which the audience can find profound insight in addition to appreciating the value of the experience and the exchange of knowledge.

This has led to an explosion in the number of events that have defined themselves as festivals, lending itself to a "festival mania" with a more and more confused profile. The exact number of events is hard to calculate (given the high birth and mortality rate of many of these largely local experiences), and all attempts to make a comprehensive inventory of events in Italy have proven ineffective. This is partly due to a generic use of the term "festival," making it difficult to compare these events, especially given the great success of cultural events and the large variety of topics and in-depth analyses to be found (face-to-face meetings with authors, readings, lectures, debates, etc.).

Festivals and their partners

Festivals play a complex role because of their relationships with a large variety of entities, often with contradictory needs. The context in which different cultural operators work also requires interpretation. In terms of public administration, festival support is set within specific cultural policies:

— urban planning: improving the value of monuments, creating a new balance between suburban and central neighborhoods, rehabilitating entire neighborhoods and territories;
— (re)thinking public spaces;
— promoting the "new" and the "other" to benefit local communities;
— social inclusion and integration;
— developing local identities and creative trends;
— territorial marketing and strategic positioning.

For artists and organizers, festivals represent a chance for artistic and conceptual experimentation. They accept the challenge of planning an event while managing specific "spaces" and "times" that seem to oscillate schizophrenically between being restrictions or possibilities for new expression. The

festival can be a meeting point between communities and a larger territory. They can represent an opportunity to salvage and restore dwindling identities and spiritual values in local environments while opening a dialogue between the present and the social groups that claim to represent it. Part of the festival concentrates on cultural roots, while another considers dreams, voyages, and diversity as added value, as windows to other worlds, with a focus on "other" artists or unexpected encounters.

The festival is also a challenge in terms of professional planning. This concerns productivity and sustainability in a context of fierce competition between many events scheduled within a short window of time (generally over the course of two or three summer months).

Last but not least, the role an audience plays can help us understand how a festival can be perceived in a society that is already festivalized. What incites active audience participation and which needs are immediately satisfied during the encounter between the artist and the audience? A festival is obviously a very complex equation in which the terms interact during the ritual. In other words, it is the event itself that imparts meaning to a festival.

Festivals in the Piedmont

The Piedmont region is not exceptional in Italy. Turin and its surrounding territories have not been immune to the global phenomenon of festivalization. Over the past decade, the number of the Piedmont's summer cultural festivals, as well as its off-season festivals, has shown significant growth. By a "cultural festival," we include festivals as well as events dedicated to a single performing art (music, dance, theater, street theater, cinema), events mixing or bringing together different genres; and discussion panels addressing issues of cultural heritages such as literature (in the Piedmont alone there are 6 festivals dedicated to literature and reading), spirituality, democracy, or science, among others.

The festival scene in the Piedmont has undergone an economic restructuring, and we will be limiting ourselves to events receiving regional funds based on current legislation.[1] Thus, we will be excluding those institutions

1. The Piedmont Region carries out its intervention programs in accordance with the following laws:
   — Regional Law n. 58 (8/28/1978) provides for "[s]afeguarding and developing activities tied to cultural assets" where the goal is to "promote theatrical, musical, cinematographic activities while guiding their development and promoting them throughout the regional territory."
   — Regional Law n. 68 (5/30/1980) establishes "[n]orms for the promotion of the theatre and prose activities" in order to provide a regulatory system protecting professional theatrical activities.
   — Regional Law n. 17 (7/15/2003) addresses the "[p]romotion and support of artistic street expressions" and modifies Regional Law n.8 (4/4/2003).

that normally operate within the sphere of live entertainment or more generally within the cultural sector but have not been financed by the Department of Culture of the Piedmont Region through specific laws.

The Piedmont Cultural Observatory[1] has gathered together and systematized information regarding 94 festivals with a wide range of legal statuses (associations, foundations, cooperatives, local institutions, etc.), all of which received regional funding in 2010. We can note a slight decrease in the number of 2010 festivals requesting financial aid since there were 99 such festivals in 2009.

Figure 1. Festival income structure

Festival-generated income	17%
Earnings	20%
Public & private contributions	63%
State	4%
Region	26%
Province	1%
Municipalities	12%
Private contributions	20%

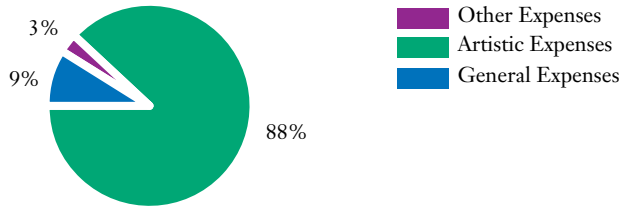
For the festivals identified by the Cultural Observatory as benefitting from regional contributions in 2010, the aggregate budget reaches approximately 14 million euros. Festival financing in the Piedmont is closely tied to private and public contributions (state, regional, and local bodies; banks; and other private organizations), representing 63% of the overall budget. Among the public actors who sustain and promote fundraising activities, the most diligent in terms of investment is the Piedmont Region (whose contributions account for almost one-fourth of the entire budget).

Contributions from the business sector represent slightly less than 20% of festival income in the Piedmont, clearly demonstrating how weak entrepreneurial involvement is. On the one hand, this indicator demonstrates how dependent Piedmont festivals are on public funding, while on the other hand, it underlines an aspect that more broadly characterizes Italian festivals: free admissions policies or reduced ticket prices. A ranking of the income sources for Piedmont festivals is very consistent with the analysis in chapter 3 of the current work.

1. The Piedmont Cultural Observatory was established in 1998 as a public-private partnership regulated by a specific protocol agreement. The Observatory's function is to offer a systematic and up-to-date overview of the main variables of the cultural sector in order to define common scenarios or fields of experience. This is to help determine which intervention strategies public authorities should pursue, to predict their results, and to understand the dynamics of the sub-sectors of the cultural field as a whole.

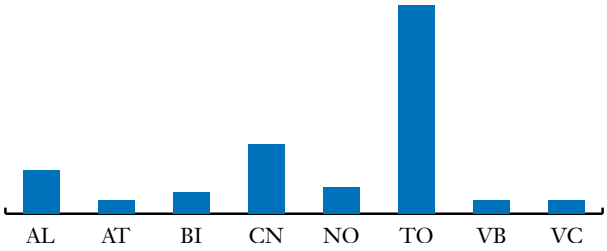
The overall expenses for Piedmont festivals during the 2010 season amounted to 17 million euros, 87.3% of which was use for artistic expenses. Unfortunately, our data does not distinguish between the four categories used in the Festudy research. In addition to all fees associated with artists, artistic expenses also cover the technical and communications expenses, while general expenses address only administrative expenses. The category "artistic expenses" includes artistic direction, payments to artists, fees and payments to freelancers and independent contractors, fees and payments to technicians, expenses related to setting up shows, expenses associated with renting venues, all of the expenses related to the reception and accommodation of artists during their stay, and expenses for communication and promotion. When compared with the expense structure of the 390 festivals of the Festudy sample, we can see that in the Piedmont, too, general expenses (administrative expenses) are limited to an average of about 12% of total festival expenditures. The budgetary diversity characterizing our sample is not visible in this approach, though we can say that generally fees and payments to artists and contractors are at the head of the list, immediately followed by technical expenses.

Figure 2. Distribution of festival expenses by category



In terms of geographical distribution, there is a high concentration of events in the provincial capitals, where over half of all the events (51%) within the region are held.

Figure 3. The geographical distribution of festivals in the Piedmont



In terms of audience, the festivals in the Piedmont hosted over 1,000 shows covering a total of 700 days and involving nearly 700,000 audience members.

The economic and non-economic impact of MITO Settembre Musica

In 2012, the Piedmont Cultural Observatory conducted a study of the economic impact of *MITO Settembre Musica*, one of the most important music festivals in the Piedmont.[1] This study contributes to the continuing debate on the relationship between culture and socio-economic development. Expenditures in the cultural field are often considered as governmental interventions, and thus, their real effects on the economy are difficult to measure. Indeed, they are even considered to be an unjustifiable luxury in these times of economic crisis. Measurable results presented in a scientific way, however, make it easier for donors and organizers to have a common framework for evaluating how cultural initiatives affect many sectors of the local economy. Nevertheless, we do not wish economic considerations to be considered as the sole criterion as this would exclude the many different non-monetary impacts of the cultural sector. Cultural activities can contribute to improving the quality of life of the resident population, strengthening regional or local image and touristic appeal, strengthening practices of cultural consumption, developing practical knowledge in the localities, and building up creative capital via artistic production.

For these reasons, our evaluation of the *MITO*'s economic impacts uses a methodology which attempts to quantify as many of these different dimensions as possible, and our analysis of economic impacts is strictly connected to data concerning audience satisfaction. Our methodological approach identifies the *MITO*'s distinguishing features:

— the "density" and the variety of the program, including different musical genres ranging from classical to contemporary, from baroque to jazz and crossover, from pop to ethnic music. There were 87 concerts and a total of 45,933 tickets. Of these, 13,250 were free and 32,683 required payment;

— the spatial dimension structuring the festival presence. This has two components: the festival's artistic excellence and its territorial involvement;

— the temporal dimension: the 2012 *MITO* season lasted 19 days and marked the thirty year anniversary of the event;

1. Building upon the 30 years of experience of Torino's original and prestigious Settembre Musica, the festival became MITO Settembre Musica in 2007 when Turin and Milan teamed up for a joint effort in the arts. The Torino Settembre Musica festival got its start in 1978 thanks to efforts by Giorgio Balmas, then Commissioner for Culture and the Arts in Torino, who will always be remembered as an original cultural promoter. It was the first festival in Italy to bring highbrow music out of the concert halls and attract new audiences with rich and novel programs. In 1986 Roman Vlad and Enzo Restagno took over the artistic direction of the festival. They worked together until 2006, when Enzo Restagno took the helm, going on to assume leadership of the MITO SettembreMusica one year later. The festival presents a wide range of musical genres, from highbrow music – featuring early, classical and contemporary styles performed by symphonic orchestras and chamber music ensembles – to jazz, rock, pop, and singer-songwriter performances, with projects often created exclusively for MITO SettembreMusica.

— the social dimension of the festival, with concerts not only in theatres, but also in lower-income suburbs, hospitals, nursing homes, and prisons, for example.

Our analysis shows that the *MITO*'s audience composition is similar to that of classical music events. First, women are more present than men (60% female/40% male). The average age of the festival audience is situated at 52. Its audience members show a high degree of festival loyalty, and many of its habitual festival attendees first approached the MITO in adulthood. Indeed, for these returning audience members, the average age of their first visit to the MITO is rather high: 42. The most highly represented age bracket is the over-60 year olds (36.4%), followed by participants in their 50s, representing roughly a quarter of the total audience. The *MITO* audience is characterized by the presence of a hard core of "loyalists" who, over the years, have maintained a special relationship with the event. New audience members are generally not adolescents or young adults but more likely those over 40 years of age.

The *MITO* draws a large majority of its audience from the local area: 87% of the audience comes from Turin or elsewhere within the Piedmont while 6.3% are from outside the province. As we have noted, the audience of the *MITO* is characterized by a lasting relationship with the festival, but there is also a high attendance rate for its different events. Thus, those who have been attending the festival for an average of 13 years plan to attend around 5 shows. Almost half (46.4%) have attended 7 seasons, and around a quarter (23.7%) attend more than 7 shows.

In terms of the audience's education level, we can see that over half of the respondents (56.9%) have a university degree or a Ph.D., and 36% have completed secondary education. This data confirms what has been shown in many surveys of the performing arts' audiences and those of classical music in particular: an already high education level that is continuing to rise. Audience employment data is consistent with the data on age. There is strong participation on the part of pensioners (28%), followed by professionals and teachers, with a low rate of student participation (5%).

Our analysis of the communication channels audience members use to stay informed of MITO events shows a sort of "involution": compared with the 2007 audience analysis, we can see remarkable growth in pre-existing knowledge (indicated by 84.4% of respondents) and an overall decline in all other channels of communication, including word of mouth. If, on the one hand, this is a reflection of the event's reputation, on the other hand, it shows a reduction in the effectiveness of traditional channels of communication (posters and programs, newspapers and magazines, radio and TV).

The audience members appreciate the program, the artists, and the chance to increase their cultural knowledge. The relational dimension (recommendations from friends or the chance of being with people who share the same tastes) is secondary. In fact, the festival experience in itself is the principal factor in attracting audiences. In other words, the *MITO* is appreciated because of the quality of its program and its performers. It increasingly seems that audience participation in the *MITO* corresponds closely to the desire for personal individual growth in terms of knowledge and aesthetic-hedonistic appreciation.

The economic impact of the MITO

We used indicators developed by the National Institute of Tourism Research (ISNART) to estimate the impact *MITO* audience spending has had on the local economy. These indicators were developed to study cultural tourism in urban areas. The economic contribution directly generated by the *MITO* audience[1] has been estimated at 271,412.21€, to which must be added 121,107.41€ generated by the artists (and the staff) who were involved in the event. Overall, the total direct economic impact was 392,519.62€.

To conduct this study, we established categories for common audience expense items:

— dining (restaurants, pizzerias, bars, bakeries);
— purchase of food, wine, and locally crafted products;
— expenses related to other types of products and leisure;
— accommodation, limited to those who used accommodation in Turin and its metropolitan area.

The study also includes purchases made by local audience members, but these were limited to only two categories: catering and shopping/leisure. If we add these figures, our total expenditures rise to 712,057.00€. Finally, event-related production costs also had a direct impact on local production and commercial activity. This can be estimated at 1,900,300.00€. If we add local and tourist spending, the total impact is 2,612,357€. The figure below shows the direct economic impact of the festival by source.

Figure 4. The economic impact of the MITO by source

Expenses	Amount (€)
Tourists and Artists	392,519
Festival budget	1,900,300
Subtotal	2,292,819
Local audiences	319,538
Total	2,612,357

1. In this study, we have excluded residents of the metropolitan area.

In the final analysis, the real impact of a festival like the *MITO* can be found in non-economic factors such as the well-being of local residents, quality of life, increasing consumption and cultural practices, practical knowledge, and a higher level of creative capital and artistic production.

The many possible futures of Italian festivals

Knowledge-based festivals, experimental festivals, conventional festivals, cultural festivals, urban festivals, rural festivals: perhaps the ongoing attempt to define various festival types could continue forever. Nevertheless, if we abandon the obsessive labeling of reality by forcing it into inadequate abstractions, we can see the true essence of what Italian festivals have been doing for the past half century.

This is far removed from an approach based on the labeling and reproduction of festival formats. Italian operators favor individuating their events, explicitly eschewing customization. Similarly, they are opposed to elaborating management models which can be easily replicated and adopted by others. Thus, we can see a large diversity of legal statuses in Italian festivals (associations, foundations, direct management by municipalities, joint ventures between public and private actors, among others). Last but not least, Italian operators tend to privilege new and innovative festival formats to which they adapt the contents of their events.

This diversity extends to festival length and location. Some festivals take place during the space of a weekend with several events scheduled per day, while others can last for more than one month or even the entire summer season. In terms of festival sites, one of the more interesting trends in our province is to choose urban spaces based on two opposing criteria. One is to place a festival in urban areas of extreme beauty capable of inciting intense and immersive participation due to their charm. These are sites with the potential of becoming true "festival-towns." The other successful approach is to identify sites in larger cities by rethinking the urban landscape and, indeed, revitalizing old industrial areas.

Festivals in Italy could therefore be defined as being oriented toward experimentation, innovation and subversion of the rules, this both in artistic, managerial, and organizational terms. New developments, whether small or large, continue to occur and always reveal new elements and new expressive and creative opportunities. Currently, for example, there is quantitative growth in festival activity, especially in terms of prolonging the life cycle of the events. In some cases, events outlast the conclusion of the festival. In other cases, there have been alternative events, conceived of as previews to or *grand finales* of the core moment of the festival. While these attempts to prolong the life

cycle of a festival appear to be ineffective, there are a number of new ways to channel this energy back to the festival territory and its artistic scene. In particular, there are two highly interesting cases within Italy: the *Dro de Sera* and *Operaestate Festival Veneto* festivals.

Since their origins, both festivals were able to combine an ambition towards Western and Central European projects and models with an emphasis on promoting local territories and accommodating local needs. This has led to a highly original format, tailored according to the needs and limits of local territories.

Both festivals are characterized by the specific attention they pay to contemporary arts (particularly research, dance, and theater) and new means of communication. Both artistic and communication strategies have been enhanced by the format of a "service-based" show which works for European awareness, especially in terms of artistic offerings.

Both festivals find artistic inspiration in *listening*, *exploring*, *monitoring*, *scouting and identifying the new*, in terms of expressive and creative possibilities at the local, national and international levels.

These festivals promote a process that could lead to the creation of new spaces for dialogue, at different levels and through different media, between various artists. The festival, then, becomes an incubator, a catalyst, and a "chaperone". This role is being developed through constant and continuous activity that, with time, has become more and more specific to certain artistic tendencies and to certain codes of the contemporary scene (performance arts and dance). For a festival to assume the role of "chaperone," it must constantly innovate in its artistic and managerial vision. For example, the artists performing at the *Dro* festival receive assistance from the Fies Factory, while Bassano works with the CSC (*Centro per la Scena Contemporanea*). The event ceases to be confined to a short-term season, becoming a long-term project that identifies, accompanies and supports its own artists through creative development and dialogue on the local, national, and international level.

Festivals in Norway

Jorid Vaagland

Norwegian festivals have a rather long history. Traditions like local markets and *kappleik* (folk music and dance competitions) were precursors to festivals. Local markets have existed since the 12th century, and while trade and exchange were their core activities, these coexisted with music, dance, feasts, competitions and circus-like performances. The Norwegian term "*kappleik*," signifying "meeting places," originally refers to a competition based on Norwegian vocal and instrumental folk music and folk dance. From the end of the 19th century onward, local *kappleikar* were held all over the country. The first *kappleik* held on a national level took place in 1897 and soon developed into a large festival lasting for several days. It is still organized annually, at different places every year.

The *Peer Gynt Festival*, drawing on Henrik Ibsen's original *Peer Gynt*, is considered as the first true festival in Norway. It was first held in 1928, to commemorate the 100th anniversary of Ibsen's birth. Since 1967, the festival has been held every year in the beginning of August. Likewise, from 1898 onward, several initiatives were undertaken to establish a large cultural event in Bergen, the home city of the composer Edvard Grieg. The first event, however, was not organized until March 1931 (Storaas 1987). The following year this event met with little success, and more than 20 years passed before the next festival was organized. In 1953, the first *Bergen International Festival* was held, marking the 100th anniversary of the birth of Edvard Grieg and inspired by the big European *Festspiele*, typically taking place in secondary cities in the post-war period (Waade 2002). Since then, this festival has been held annually.

During the 1960's, several big festivals were established and remain among the most important of their kind today. The first folk music festival *Jørn Hilmestemnet* started as a combination of *kappleik*, concerts, theatre, and dance. Another big festival, the *Molde International Jazz Festival*, was held for the first time in August 1961. It did not arouse a great amount of enthusiasm due to the fact that it was held far from Oslo, regarded as the main center for jazz in the country. Finally, in June 1965, the first *Arts Festival of North Norway* was organized. From the 1990's onwards, there has been a veritable festival boom in Norway. This period has been, however, one of little stability, with many festivals being established only to collapse a few years later.

There is no complete register of festivals in Norway. A study conducted in 2010 (Storstad 2010) estimated there were between 900 and 1000 festivals, including *festspill* and festivals of historic plays, in the country. Of the 429

municipalities in existence in 2010, 75% of them reported having hosted at least one festival in 2007.[1] Approximately 40% of these were music festivals. As many as 34% of the total number were categorized as "other," probably events with diverse activities including some which were cultural. The 2010 study includes all kinds of events called "festivals" by the respondents (municipal employees). Their use of the term festival is not necessarily very clear since the term "festival" is used in not very consistent ways in Norway. In cultural policy and for research purposes, the following criteria are normally used when talking about festivals:

— a minimum duration of two days;
— the presence of several events (concerts, films, performances);
— a specific theme or content, mostly cultural in nature (i.e. film, jazz, rock);
— an annual or biennial season taking place at approximately the same time of year.

In daily use, the term festival also includes one-day events and events having primary contents other than cultural ones (i.e. food festivals, trade conventions, local celebrations). The term *'festspill'* is mostly used to refer to big festivals, mainly of classical music but including other genres of art as well.

The evolution of festival policies

Since World War II, Norwegian cultural policy has had an egalitarian and democratic dimension in which cultural activities and the consumption of culture have been regarded as a social right for all. During the last 40 years, not only national authorities but also counties and municipalities have played important roles in this work. In the 1970s and 1980s, all counties and municipalities were required to develop their own administrative and political units to handle questions of cultural policy and distribute funding to cultural activities (Mangset 1992, NOU 2013). Since the 1990s, however, the national level in cultural policy has been strengthened, with regional and local levels playing a less independent role. For instance, a substantial part of local and regional cultural budgets is now used to co-finance institutions and activities that the national authorities have found to be deserving of financial support. In 2007, Norway implemented a culture law, stating that the state, the counties and the municipalities all have responsibilities in promoting and facilitating cultural activities.

Over the last eight years, the current government has given a high priority to culture. Starting in 2005, it set forth Cultural Initiative I and Cultural Initiative II. One of the goals of these initiatives is that, by 2014, 1% of the governmental budget should be allocated to culture. As of 2013, this goal is well

1. Given that the population of Norway is approximately 5 million, there is one festival per 5,000 inhabitants.

on its way to being reached. The national cultural budget has risen by about 50% during the last 8 years (NOU 2013:4). Indeed, while the cultural budgets of some other European countries have been reduced by up to 30% since 2008, Norway's cultural budget has increased by 30% over the same period.

National festival support

1952 marked the first time that governmental support was provided for a cultural event taking place at regular intervals during a limited time span, the *Bergen Festival*. In this case, the question of financial support was subject to debate at least three times in the parliament before a decision on festival financing could be made. Indeed, festival was then regarded as "a local affair with no grounding in the aims of the national cultural policy" (Storaas 1987). Rather, reconstruction and public education were "the aims of national cultural policy" during this period. After this precedent, national support to festivals was irregular in nature and came in diverse forms. Already in 1966, several festivals were receiving financial aid from the Norwegian Cultural Fund.

It was only in 1996 that work was underway to establish specific grants for festivals. A committee created by the Ministry of Culture took practical steps in this direction by making guidelines for a special grant for music festivals and *festspill*. In June 1996, the committee proposed two special grants: Proposal 1) a grant for important festivals inscribed within the framework of national cultural policy, and Proposal 2) a grant for other festivals that was to be distributed over a three-year period. Festivals of a largely local profile were to be excluded from the grant while financial support for establishing new festivals was considered a local or regional responsibility (Kulturdepartementet, 1996).

Proposal 2 was enacted immediately, and since 1998, there has been a grant for music festival projects which is still the most important of its kind, measured by the number of applicants as well as the total amount of money distributed.[2] It was only in 2007 that Proposal 1 was fully established as a grant primarily *for festivals*. However, since 1995, several art institutions have been given national responsibility for promoting high-quality art. There are three categories of such institutions, with somewhat different public financing models. The category called *knutepunkt* is particularly relevant here.

The *knutepunkt* receive 60% of their financing from the national government and 40% from local and regional authorities, except for the three northernmost counties for which the proportion was 70:30. In 1995, 13 institutions

2. Later, grants were also created for festivals of literature, film, and historic plays. Other festivals have no specific grants reserved for them but may receive support from more general grants.

were given the status of *knutepunkt*. Most of them were traditional organisations, but the *Bergen International Festival* and the *Art Festival of North Norway* were also among them. In the following years, several other festivals were given the status of *knutepunkt*.

The White Paper on knutepunkt created important changes in the *knutepunkt* grant. Since then, the grant is, at least implicitly, limited only to festivals. Further, it described nine criteria and missions for *knutepunkt* and set forth the principle that there should be only *one* knutepunkt *for each genre*. However, all the existing *knutepunkt* were to keep the status they had already acquired, and among them were several *festspill* with quite similar artistic profiles.

According to the 2007 White Paper, the *knutepunkt* were to be evaluated every four years to determine if they would retain their status. The three *knutepunkt* included in the first evaluation in 2011 all retained their status. Two other *knutepunkt* are being evaluated in the 2012-2013 period. As of March 2013, there are 16 *knutepunkt* festivals in all, 12 of which are more or less pure music festivals while the remaining events are dedicated to other arts. Figure 1 classifies the twelve music *knutepunkt* festivals by the year in which they acquired this status:

Figure 1. *Knutepunkt* festivals in Norway.

Name of festival (in English when possible)	Year in which *knutepunkt* status was acquired
Bergen International Festival	1995
Arts festival of North Norway	1995
St. Olav Festival	1999
Molde International Jazz Festival	2000
Førde Traditional and World Music Festival Norway	2005
Festspillene i Elverum	2006
Ultima Oslo Contemporary Music Festival	2006
Notodden Blues Festival	2007
The Øya Festival	2008
Oslo Mela	2008
Riddu Riðđu International Indigenous Festival	2008
Norsk Country Treff	2011

The Ministry of Culture and the Arts Council of Norway have quite explicit criteria. Their grants for music festivals stress the overall goal of making high-quality music available to as many as possible. Other criteria include innovation and development, the support of contemporary music, offering

music to children and young people, sustaining and encouraging the development of high-quality music festivals, and stimulating innovative ways of promoting music.

Festival grants generally support festivals for which public concerts constitute their main activity and which are organized on an annual or biennial basis, last at least two days, and receive public financial support from their own region. The government has assigned a mission to *knutepunkt* festivals which consists of the following nine points. Festivals must:
— be firmly rooted in the local context, garnering considerable local support, serving as a resource in local culture, and mobilizing local volunteers;
— have festival activity every year meant for a broad public while maintaining operational resources throughout the year;
— possess a leading national position within its cultural field or genre, with a program of high artistic quality;
— play a central role in fostering cooperation among festivals of their genre;
— have a national and international orientation by, for example, presenting artists respected on a national and international level;
— be innovative and development-oriented (developing their musical genre and including experimental works in their festival program);
— pursue audience development by bringing the arts to wide audiences and reaching new audiences);
— display good resource management by meeting artistic, managerial and audience targets; and
— meet funding requirements, with regional authorities financing 40% of the festival and national authorities financing the remaining 60% (30:70 in the three northernmost counties).

Knutepunkt festivals are also expected to organize activities throughout the year in cooperation with other local or regional cultural actors.

Other ministries also provide sporadic festival support in a more indirect way than that of the Ministry of Culture and the Arts Council of Norway (Vaagland 2011). This can be through promoting local communities (the Ministry of Local Government and Regional Development); promoting Norway abroad and seeking out cooperative possibilities on an international level (the Ministry for Foreign Affairs); and promoting trade, tourism and other industries (the Ministry of Trade and Industry). The criteria for municipal festival support are the same as for their financial support of other measures.

The role national authorities play in festival policy is primarily economic in nature. The national cultural budget includes grants for festivals of different

genres. In 2011 these grants amounted to 18.2 million euros, which is nearly 1.7% of the total national cultural budget. The distribution of these subsidies by type of festival can be seen in figure 2:

Figure 2. Funding by type of festival (2011)

Type of festival	Knutepunkt festivals		Other festivals	
	Euros	Number of festivals	Euros	Number of festivals
Music	9,250,000	12	4,125,000	Appr. 100
Visual arts	688,000	1	201,000	10
Theater/performance arts	462,000	1	390,000	37
Literature	325,000	1	375,000	40
Film	313,000	1	2,065,000	44
Total	**11,038,000**	**16**	**7,157,000**	**230**

Music festivals received 73.5% of the total festival grants, which amounts to 1.25% of the total national cultural budget. 61% of all national festival support was given to the *knutepunkt* festivals. 84% of the *knutepunkt* grants were allotted to music festivals. The amount of national support to *knutepunkt* festivals varies widely, from 2.3 million€ (the *Bergen International Festival*) to 180,000€, distributed to rock and country music *knutepunkt*.

Regional and local festival policies

With festival funding, the extrinsic value of festivals is stressed, not only by certain national authorities but also by the councils and municipalities which provide festival support. Arguments concerning the economic effects of festivals are often considered. Regional and local authorities do indeed play a financial role in festivals, but they may also provide other kinds of support. For instance, they often make available arenas, equipment, and administrative services. In some cases, they are also involved in planning and technical organization. They may encourage cooperation and provide professional development opportunities. In some cases, municipalities (and counties) are also among the owners or founders of festivals. What they do *not* want to do is to influence festival content; this must remain exclusively within the purview of the festival founders (Vestby et al. 2012).

Many counties and municipalities have no specific criteria for festival support. Often, the criteria only indicate the purpose of the grant and who may apply for financial support. Most counties provide financing only to activities (including festivals) that are of interest to more than one municipality and thus may require cooperation between the different entities

involved. Some counties support festivals only if the host municipality also provides support.

Other criteria vary widely. Some counties and municipalities restrict their support to festivals or events which last three or more days, while others stipulate a minimum of two days. Some only provide support to festivals with a non-commercial profile, while others only support festivals with primarily artistic programs. Still others prioritize the quality of the cultural event and/or innovative cultural expressions in their criteria. Some counties and municipalities also emphasize the (potential) effects on regional/local development, tourism, or industry in their festival policies. Festivals involving children and youngsters in their programming or identifying these as their target groups may be given priority. As mentioned earlier, most national grants within the field of cultural policy presuppose local and/or regional co-financing. This is also true of festival grants, including the *knutepunkt* grant.

Financial aid from the counties

The regional level in Norway consists of 19 counties, the capital, Oslo, being both a county and a municipality. The counties are very different in terms of the number of festivals they host and in their festival support, as shown in figure 3. *Knutepunkt* festivals normally receive much more county support than other festivals.

Many counties have specific grants for festivals, mostly providing support for one year, but festivals may also obtain project support for specific activities. Some counties have special agreements with certain festivals, guaranteeing them financial support for three to five years. Oppland county, for example, has such agreements with eight festivals, including its two *knutepunkt* festivals. Østfold county gives support over a three-year period to three different festivals.

Figure 3. Festival support by county

Counties* (Population as of January 2012)	Number of festivals supported (both *knutepunkt* and others)	Total festival support (in thousands of euros)	Number of music festivals supported (both *knutepunkt* and others)	Total support to music festivals (in thousands of euros)
Finnmark (73,787)	14 (+1**)	215**	7 (+1**)	145**
Troms (158,650)	29+2**	612**	13+2**	356**
Nordland (238,320)	34+1 (+1**)	505**	19 (+1**)	280**
Nord-Trøndelag (133,390)	21	76	9	74
Sør-Trøndelag (297,950)	27+1	588	13+1	213
Møre og Romsdal (256,628)	11+1	398	2+1	270
Sogn og Fjordane (108,201)	9+2	493	8+2	480
Hordaland (490,570)	47+1	1,100	25+1	763
Rogaland (443,115)	38	558	16	138
Vest-Agder (174,324)	22	198	15	151
Aust-Agder (111,495)	10+1	220	7	154
Telemark (170,023)	18+1	389	11+1	180
Vestfold (236,424)	2	245	2	245
Akershus (556,254)	0	0	0	0
Oslo (613,285)	25+3	2,287	13+3	1,901
Oppland (187,147)	13+2	435	6	116
Hedmark (192,791)	17+1	195	8+1	143
Buskerud (265,164)	14	194	8	147
Østfold (278,352)	6	178	3	33
Total festival support provided by counties	**357+16**	**8,886**	**185+12**	**5,789**

* The Saami Parliament should be mentioned among the regional organs. It is the democratic organ of the Saami population in Norway and works to strengthen the position and interests of the Saami in Norway, supporting different Saami projects. In 2011, four Saami festivals were supported, but it has not been possible to coordinate with the Saami Parliament to obtain the necessary data.

** The Arts Festival of North Norway is a *knutepunkt* festival taking place in Harstad in the county of Troms, but the local/regional share of the *knutepunkt* support is divided between the host municipality (Harstad) and three different counties (Nordland, Troms and Finnmark). The regional support given to this festival is included in the numbers for each of the three counties.

Municipalities' festival support

It is impossible to provide a good overview of festival policy at the local level. There are no specific national statistics on municipal support to festivals,

but data about their expenses in various fields indicates a growth in expenses related to festivals and cultural events after 2000 and especially after 2005.

Festival support from local authorities ranges from one thousand euros to hundreds of thousands of euros. Municipalities hosting *knutepunkt* festivals generally allot more money to festivals than other municipalities of comparable size and structure. The municipality of Bergen, for example, contributed 1 million euros to the *Bergen International Festival* in 2011, by far the biggest sum given to a single festival by any municipality. The municipality of Oslo contributes a total of 900,000 euros per year to two of its three *knutepunkt* festivals (the Øya and *Ultima* festivals), while the third (*Oslo Mela*) receives about 1,200 euros.

The level of local support to non-*knutepunkt* festivals is generally low, but this is largely a reflection of the authorities' expectations. If a municipality believes that a festival is capable of attracting audiences to the locality or region, it is prepared to make a substantial financial contribution. Even small municipalities may resort to this strategy if they believe it will put the municipality "on the map." Nevertheless, even if festivals normally receive relatively little financial support from their host municipalities, this support does have symbolic importance, indicating a certain level of recognition and motivating other investors or organizations to help finance the festival (Vestby 2012).

Festivals as cultural tools and sources of controversy

Festivals are normally local initiatives. As such, their goal is first to create a cultural and social experience on the local level and thereby develop a more dynamic local community, especially for the younger inhabitants. Since local and regional authorities often support festivals based on their presumed importance for the local economy, festival organizers may also use arguments related to their economic impact to obtain public support. However, most of them stress the cultural aspects of their festival, arguing that it provides an opportunity to showcase the uniqueness of the locality, including marketing local food and displaying other local traditions.

The fact that festivals take place all over the country, in both big and small places, makes them important tools in implementing the national policy of making culture available to all and strengthening public cultural participation. Festivals are very diverse, and the dominant demographic they attract may differ greatly from festival to festival. Some attract audiences different from those that usually visit permanent cultural venues. Indeed, the social aspect of festivals may make them more attractive than these venues. However, the democratization argument is seldom raised when discussing the importance of individual festivals.

Over the last decade, sustainable development has emerged as an important issue in the festival agenda, and programs or "awards" for sustainable practices involve festivals as well as other types of organizations. Some festivals have, however, their own explicit strategies regarding ecological, economic or social objectives. The *Oya* festival in Oslo, for example, has won several international awards for its ecological approach to live music.

At the same time, festivals have begun to give rise to debate over their social importance, policies, and economic impact. Local politicians often argue that festivals have important effects on the local economy and community development. Researchers, however, disagree about how festivals affect the local and regional economy, especially when their economic impact is compared to other economic activities (Ericsson 2003, Aronsen 2006, Hjemdahl et al. 2007). This does not contradict the fact that, with the decline of the record industry, festivals now play a much more important role as employers of musicians and other artists. Indeed, the growing number of freelance musicians and artists that has accompanied changes in the cultural sector, particularly on the level of institutions, makes this a central theme.

From a different standpoint, permanent venues compete with festivals that are extending their own programming period. This is particularly the case with *knutepunkt*. Their status attracts a much higher degree of economic support than most other festivals can normally obtain. This makes the *knutepunkt* status quite attractive, but it also leads to debate about the degree to which the actual *knutepunkt* festivals fulfill the criteria associated with their status. In some cases, for instance, it is questioned whether the *knutepunkt* really do play a leading national role within their genre. Some *knutepunkt* are highly criticized for not cooperating enough with other festivals of the same genre. Others are accused of using their privileged economic position to offer higher artistic fees than non-*knutepunkt* festivals can afford, thus making it difficult for the latter to hire attractive artists.

The *knutepunkt* grant is also controversial among municipalities and counties, since they must give 40% of their financial support to their *knutepunkt*. This support may represent a substantial part of local and regional cultural budgets, and the fact that counties and municipalities are not always involved in the financial decision-making process is felt as a threat to the important principle of local and regional autonomy.

Unique characteristics within the national festival landscape

The biggest festivals are concentrated in the southern part of Norway and are most often located in or close to big metropolitan areas, but there are also several examples of very popular festivals held in remote areas. The

quantitative survey material only provides us with a partial image of their urban-rural distribution. In terms of other indicators, 40% of the festivals reported in 2007 were music festivals, with the remaining 60% equally distributed among other categories such as gastronomy, theater, literature, arts, and film. Among music festivals, most are dedicated to rhythmic music (pop, rock, jazz, folk music, world music and their subgenres). The great majority of festivals take place in the summer time, mainly between May and August, though there are also some winter festivals, mostly old traditional events.

Human resources

Most festivals have a very limited number of paid administrative personnel. The study we analyzed earlier (Storstad 2010) estimated that Norwegian festivals taken as a whole had in total 270 salaried employees, or an average of 0.3 employees per festival. Few festivals have more than five paid full-time employees, and many have less than one. Before, during, and after the festival, however, the festival organization takes on both paid professionals and volunteers, on which all festivals depend very heavily. Many people see volunteer work as an attractive way to participate in a festival without paying its associated fees.

Volunteering is one of the oldest traditions in Norway (traced back to the 13th century), and it has remained vital through changing social conditions. It was seen as a normal practice to mobilize unpaid work forces for heavy work that had to be done in a short amount of time, particularly in farming communities. Making food for weddings, harvesting corn before the first frost, or building a roof to protect a new house from rain and snow were common *dugnad*[1] tasks. The *dugnad* team was served food while they worked but received no payment. However, *dugnad* also implied reciprocity, and one took for granted that, eventually, the favor would be returned. Communal tasks have also been accomplished through this *dugnad* system, but in these cases it was obligatory to take part in these tasks, situating them at the interstices of public authority, local community, and the private sector (Lorentzen & Dugstad 2011). For generations, there was also organized volunteer work connected to different social and political movements. Loyalty to basic values was important in these organizations, and their members were faithful until their death.

Today, volunteer work is still very important in Norway. Both the number of volunteer work hours and the percentage of inhabitants engaged in such work are higher than in most other countries throughout the world (Sivesind

1. An old Norwegian word for this kind of unpaid work.

2007). Fifty-eight percent of the adult population takes part in volunteer work for one year, laboring for a total of 115,000 hours. Eleven percent of volunteer work takes place within the cultural sector, with festivals receiving the bulk of it. Volunteering has, however, become much less stable in character. It is more action-based, concentrated on shorter periods of time, with individual tastes and interests becoming more important motives than ideologies and values (Sivesind 2007). Festivals and other events are typical arenas for this new kind of volunteer (Aagedal et al, 2009). The numbers of volunteers vary considerably. Big outdoor rock festivals like Øya and Hove can mobilize more than 2000 volunteers, while festivals in other genres, as well as professionalized festivals with well-staffed administrative teams, need fewer volunteers. For instance, there are around 500 volunteers in the Bergen International Festival.

Volunteer work in festivals may be of two different kinds. First, individuals are mobilized for short-term tasks before, during, or after the festival period. They normally receive festival passes, tickets, t-shirts and food as a form of symbolic payment. Some festivals also invite their volunteers to a party or a concert after the festival. Second, volunteer groups are mobilized for bigger tasks (transportation, security, service, and sales) with the organizations themselves being paid a certain amount of money while their members work for free.

Festival organization and the roles played by festival associations and companies

In general, festivals are individual economic and legal organizations, and for most of them, it is more appropriate to speak of ideals than commercial goals. Thus, the first priority of the festival founders is to make available cultural and/or social experiences, while individual profit is not generally a factor motivating their decisions.

There are several associations of festivals that promote festival interests and provide services and networks for their members. Eighty-two festivals of different genres are members of *Norway Festivals*, which is one of the member associations of the *European Festivals Association* (EFA). Fifty-three of its members are music festivals. Fifty-four festivals are members of the *Norwegian Live Music Association*, which has around 280 members in all (clubs, concert venues, student associations, and festivals). About 20 jazz festivals are members of the *Norwegian Jazzforum*. Certain festivals are members of more than one of the above organizations. The *Hove Festival* is one of the very few Norwegian festivals to be owned by national or international enterprises. It is one of six festivals owned by the British rock festival promoter *Festival Republic*.

The festival economy

The Norwegian economy is very solid and has not been severely hit by the financial crisis. Government financing of culture has substantially increased, even in the midst of the European crisis. Public festival support has also been steadily rising year after year, especially at the national level. At the regional and local levels, the economic situation is more difficult.

The Norwegian festival economy is very risky. A number of festivals collapse every year due to financial difficulties. Festivals must face the dilemma of steadily-rising costs[1] which must be absorbed by unpredictable revenues raised over the course of a few days. This makes them very vulnerable to incidents that may affect their results. For instance, several festivals received no audience members after the terrorist attacks in Oslo and Utøya in July 2011. More often, festivals must face less dramatic incidents which can nevertheless have an important impact on audience attendance, the most important being bad festival weather. The climate in Norway is very unpredictable, even in the summer, and bad weather may damage a festival's budget for several years. Every year, several festivals finish their seasons with big deficits due to lack of audience.

Reducing the number of outdoor concerts is one way of minimizing the risks caused by bad weather. At least one of the festivals in the survey (*Vestfoldfestspillene*) did so in 2012, which explains why its expenses were considerably reduced between 2011 and 2012. Advance ticket sales is another way of reducing vulnerability to bad weather and other incidents. Some festivals succeed in selling a large number of advance tickets because they have a loyal audience, even if the weather is bad. These are festivals with a unique identity, not just good music or well-known artists. Other festivals sell few tickets in advance and risk having small audiences. These are mainly festivals with less unique identities and where the programs have important headliners, but since the same headliners tend to participate in several festivals, visitors choose to go and hear them at the lucky festivals benefitting from good weather. Over the last few years, artists very often insist on being paid in advance when they sign contracts with festivals. For the artists, this is a way of securing their income, but for festivals, it means even more vulnerability in case of smaller audiences.

Most festivals practice free admissions to some extent. Sponsors and VIP guests often receive free tickets to certain concerts, and volunteers very often get festival passes or free tickets as compensation for their work. Many festivals also have concerts in parks or other public places, and they are normally free. Concerts held indoors, in venues owned or rented by the festival, are

1. Administration, communication, artistic fees, and reception costs show the highest rate of increase.

normally not free. Some festivals also give free concerts to groups of people that normally do not visit concert arenas, like the elderly, hospital patients, and school children. These concerts may be given at retirement centers, hospitals, or schools.

Even if only about 5% of the festivals receive no public support, festivals do not refuse private contributions. Public grants are not necessarily regarded as "better" than private support. Festivals are financially omnivorous, and as a result, sponsorship has always been important for festivals. A 2012 report (Sponsor Insight 2012) has shown general growth in the sponsorship field over the preceding three years. The amount of sponsorship money going to festivals has grown at a much higher rate than in other cultural sectors since 2009, only exceeded by the categories of "football" and "other sports". Festivals received 8.6% of all sponsorship money in 2012, with all other cultural events received a total of 10%. Football and the category "other sports" were the largest beneficiaries of sponsorship contributions, receiving 35% and 37% respectively of total sponsorship contributions.

* *
*

Norwegian festivals face several important challenges that may threaten their future survival. A bad festival economy due to vulnerabilities in audience size is a very important challenge to many festivals. It is also true that the festival market is saturated. In a country with 900 festivals and 5 million inhabitants spread over a very large area, there is obviously strong competition for audiences, a situation which is exaggerated by the fact that most festivals take place within the same window of time. As mentioned before, many festivals disappear after a lifespan of a few years, and it seems probable that in the future there will be fewer festivals than today. Even if, for the time being, the Norwegian economy has not suffered from the finance crisis, this is expected to change in the future due to bad European markets. This will affect sponsorship levels in general and in the cultural field.

Both the public and private financing of festivals may change considerably in the years to come. For the public sector, it is not immune to political changes. The conservative victory in September 2013 can thus have important implications, especially since it has different priorities than those held by the leftist government. Certain politicians on the right have indicated that the *knutepunkt* grant needs to be modified, and the fact that many festival organizers also question these grants indicates that such changes would be welcomed.

Music festivals in Quebec: Contexts and Perspectives

Claudine Audet & Diane Saint-Pierre[1]

The interest in studying Quebec's music festivals comes from their growing importance, both in terms of how they affect audiences as well as their economic and tourism potential on the local, regional, and national level. These events also function as a nexus, not only because of the size of their financial resources and the range of partners they solicit, but also because public authorities have become increasingly interested in them. However, despite the significant growth of Quebec's festivals over the past twenty years, relatively little research has been conducted on them. This is true both for festivals in general and music festivals in particular, the latter playing a dominant role in the cultural and festive life of Quebec.

Indeed, with the exception of a few recent studies on festivals from other artistic sectors (theater, dance, cinema, and the visual arts), one can only identify a few rare studies specifically on music festivals, such as work by Andrée Fortin (1995), Manon Ouellet and Richard Saracchi (1995), and Martine Rhéaume (2005). One can also find around 10 master's theses or doctoral dissertations submitted within the last 15 years as well as a report by the *Observatoire de la culture et des communications du Québec* (OCCQ) on 32 festivals and cultural events (Québec, ISQ/OCCQ 2002). Finally, one of the main sources of information on this country's music festivals remains the *Encyclopedia of Music in Canada*, though the analyses it provides are at times rather cursory (www.thecanadianencyclopedia.com).

Context for understanding the world of music festivals

An Overview of Quebec

Quebec is often described as a society with both a European and North American flavor. Its cultural and linguistic uniqueness can be explained by its history[2] and its affirmation of an identity that is distinct from the rest of

1. The authors wish to thank the 43 music festivals participating in this study as well as the doctoral candidates Christelle Paré and Martin Têtu and the *maîtrise*-level students Marie-France Harvey and Éveline Favretti for their work as assistants. We also wish to thank Guillaume Savard, Guy Therrien and Bruno Viens from the ministère de la Culture et des Communications, Geneviève Béliveau-Paquin from the Conseil des arts et des lettres du Québec (CALQ), and Gilles Corbeil and Céline Thibault from the Société de développement des entreprises culturelles (SODEC).

2. The phases are marked by the presence of the first indigenous peoples, then the establishment of the French colony la Nouvelle-France at the beginning of the 17th century, the British administration beginning in 1759, and finally, the Canadian Confederation in1867.

Canada, both of which have a large influence on Quebec's political, economic, and cultural life.

The distribution of power between the federal state on the one hand and the ten provinces and three northern territories on the other varies according to the sector. Like the other provinces, Quebec has constitutional jurisdiction over health, education, the municipalities, and natural resources, etc. The provincial and federal government, however, have overlapping authority on cultural matters, a situation which historically has given rise to conflicts between these two governmental levels. The federal government has functioned as the main promoter of Canadian culture and multiculturalism, while Quebec has been committed to promoting its own culture since the 1960s and soon thereafter it set in place its own policy of interculturalism, in contrast to multiculturalism, with primacy given to the French language (Gattinger and Saint-Pierre, 2011).[1]

Quebec is the largest of the Canadian provinces with nearly 1.7 million square kilometers of territory, and is second only to Ontario in terms of its population and economy. In 2011, there were 7.9 million inhabitants, with 80% living in urban areas, mainly the nine cities with over 125,000 inhabitants. Quebec City, the "*national*" capital of the province, has more 516,600 inhabitants, while Montreal is the province's metropolitan center and the second largest city in Canada with nearly 1.7 million inhabitants. The metropolitan region of Montreal (established for census purposes) alone contains 48% of Quebec's population and, together with its 82 municipalities, represents the economic and cultural motor of the province. The Montreal area also has the highest concentration of new Quebecers (a term signifying immigrant residents) and Anglophone Quebecers, making it the most culturally and linguistically diverse part of the province.

Festival history

In the early French colonial period, the first concerts, operas, recitals, or "soirées musicales" (musical evenings) were reserved for colonial "high society." By the end of the 18th century, there was already a musical tradition in Quebec City, then the main economic, political, and military center of New France. Over the course of the 19th century, festivals and other musical activities provided well-attended social occasions for French-Canadian society as well as the first immigrant communities (the English, Scottish, and Irish). At this time, music was mainly played in religious settings, usually sacred music, with choristers and organists displaying their musical talents and occasionally giving concerts. Public tastes rapidly extended to include secular music,

1. Quebec is the only province to have made French its only official language (Loi 101, 1977).

which blossomed in the latter half of the 19th century. Many organizations and musical ensembles, such as music unions and ladies' musical clubs, facilitated this process. As for music festivals, they started becoming popular in the first decades of the 20th century. At this time, their purpose was to commemorate a great composer or group of composers, a specific musical genre, or the musical talents of a city or region.

Although there is written evidence of the importance of these early festivals in Quebec's cultural life, festival activity only really began to develop during the postwar period and especially during the 1960s. Throughout this period, there was a rapid increase in the number of festivals and other cultural events, reflecting the importance given to more democratic models of cultural participation and expression. This was also tied to new aid programs, initiated on different governmental levels, as well as economic and tourist development strategies.

Though it is difficult to determine the exact number of music festivals active today in Quebec, everything indicates that their growth spread throughout the province over the course of several decades. Montreal, in particular, has a special place in Canada, experiencing considerable growth in the festival sector between 1970 and 1990, and even more growth over the last 20 years. Today, we can count at least a hundred festivals and cultural events per year, many of which are international in scale.

Public aid policies and programs

The Federal Level

Here, responsibilities are shared between the Ministry of Canadian Heritage and the Canada Council for the Arts, with the *Patrimoine Canada* managing financial aid programs for festivals. This can either be through the *Canada Arts Presentation Fund*, part of which is dedicated to artistic festivals and organizers of shows (9.7 million dollars invested in Quebec in 2010-2011[2]) (Canada, Patrimoine canadien, July 29 2011), or the *Building Communities through Arts and Heritage* program, which has a component for local festivals of all kinds ($4.4 million invested in Quebec in 2009-2010) (Canada, Patrimoine canadien, October 4 2010). Other "small" programs are managed by non-profit organizations receiving financial contributions from the federal government.[3] The Ministry of Economic Development for Canada, through its *Quebec Economic Development Program*, also provides a financial contribution to a few

2. In this chapter, financial and budgetary data will be presented in terms of Canadian dollars.

3. This is the case for Musicaction and Factor, which respectively offer Initiatives collectives (through their Accès à la scène au Québec) and Collective initiative – Minority language artists.

festivals that have demonstrated their economic and tourist impact. We also note that in 2009, the federal government set into place measures designed to compensate for the global economic recession, the decreasing number of private sponsors, and the growing competition with other tourist destinations. For two years, it targeted large tourist events including some of Quebec's major festivals.

The Provincial Level

The Ministry of Culture and Communications (MCC) has the mission of determining the global orientation of the Quebec government's cultural policies and of overseeing their implementation. It is also in charge of managing some of the financial programs for local services. The *Conseil des arts et des lettres du Québec (CALQ)* and the *Société de développement des entreprises culturelles (SODEC)*, both state-owned companies, are responsible for the majority of financial aid programs benefitting professional artists and cultural industries. In 1992 a governmental policy was adopted which reformed the public funding system for culture, and implemented sector-specific policies. *La diffusion des arts de la scène* (a policy encouraging the theater arts) is an example of this (Québec, MCC, Décembre 1996).[1] Since 1996, the CALQ and the SODEC share the responsibility of funding the main musical festivals of the province.

Accordingly, in 2011-2012, the CALQ allotted 2.5 million dollars to 23 festivals or musical events (Québec, CALQ, 2012: 31-33), and the SODEC allotted 2.3 million dollars to 38 national and international musical events (Québec, SODEC, 2012: 157-8). This was within the framework of a financial aid policy for music producers and another program supporting national and international events. The MCC also supports festivals, especially festivals of folk or traditional music, those considered to be historically important, or those whose objectives fall under the categories of "professional development," "competition," or "international." In 2011-2012, it granted 425,000 dollars to nearly a dozen music festivals.[2]

The government is also interested in festivals because of their potential impacts on tourism and the economy. In 2004-2005, the Quebec Ministry of Tourism obtained funds reserved for events attracting the largest numbers of tourists or generating the highest tourist-related sales. In 2011-2012, 12.4 million dollars were allocated in this way to cultural, sports, or tourist festivals and events (Québec, MTQ, 2012: 74), more than 30 of which were musical

1. There is no policy specifically addressing festivals. They are included in the policy for theater arts.

2. This data comes from an internal document of the Ministry of Culture and the Ministry of Tourism in Quebec.

in nature. For certain cities, the Quebec government also makes available matching funding from the Ministry of Municipal Affairs, Regions, and Land Occupancy (MAMROT) or from organs such as the *Secrétariat à la région métropolitaine* and the *Secrétariat à la Capitale-nationale*.

The Municipal Level

Since the governmental cultural policy was established in 1992, many local municipalities and regional county municipalities (*municipalités régionales de comté* or MRC) began setting up their own policies in this sector. Established by a concerted effort, these policies sometimes include elements pertaining to festivals. Some municipalities and regional bodies have also set up partnership agreements, especially with the Ministry of Culture, which can lead to financial aid for cultural organizations. In 2011, municipal expenses for "festivals and cultural events" of all artistic genres represented 6% (35.2 million dollars) of the total budget for services provided to the community. (Québec, ISQ. OCCQ, May 2013: 4). This is the category that has grown the most since 2009 in proportion to total municipal cultural expenses.

The City of Montreal distinguishes itself from other municipalities. It has been very active in providing financial support to festivals within its territory since the middle of the 1970s. It has also become more interested in the creation of new festivals. In 1987, this was reflected in the establishment of the *Bureau des festivals* within its administration. However, the most visible demonstration of its festival policies can be seen with the *Quartier des spectacles*. This was brought about by different members of Montreal's cultural milieu at the beginning of the 2000s. The City then assumed responsibility, and with provincial and federal financial aid the earliest *Quartier des spectacles* was held in 2008 in the *Place des festivals*, subsequently inaugurated in June 2011. Earlier in 2008, Montreal made a triennial agreement with three large Montreal festivals (2 of which were music festivals), promising an annual financial aid package of 1.2 million dollars (Ville de Montréal, 2008: 7).

Quebec's festival landscape: research findings

A diverse festival universe

For research purposes and through the interaction of information from different sources, we have been able to identify 65 music festivals, 43 of which (or 66%) agreed to participate in our study. (For our methodology, see Saint-Pierre and Audet, forthcoming.)

These festivals can be divided into five dominant musical styles. The most frequent of these is pop/rock (16 festivals), followed by jazz/blues (10), classical and world/traditional (7 each), and finally multi-style (3 festivals). The

category pop/rock includes many different musical genres, including *la chanson* which has been very present in Quebec since the 1960s and represents an important medium for affirming Quebec's identity. One of the most well-known *chanson* festivals is the *Festival international d'été de Québec*, which has been in existence for over 40 years and originally built its reputation by inviting artists from all over the French-speaking world. Two other examples are the *Festival de la chanson de Tadoussac* and the *Coup de cœur francophone*, founded respectively in 1984 and 1987.

The strong presence of world music festivals in Quebec and especially Montreal might not be fully represented in our survey results. Often newer and therefore smaller in size, they may less visible in our statistical data, and it must also be said that not all of the organizers of this type festival subscribe to this label. A closer look at the data concerning dominant and secondary musical styles suggests that musical diversity is much wider than our study's classification into five broad musical styles permits.

In Quebec, geography is a highly significant factor, both in general and in the cultural sector. It is thus essential to understanding certain aspects of the festival landscape. Unsurprisingly, the central and most populated regions of Montreal and Quebec City, taken together with their outlying areas[1], hold 70% of the festivals (30 and 43, respectively), 33% of which take place within city limits. The intermediate regions (those between the two central regions or peripheral to more distant regions) show the lowest occurrence of festivals (3 in all). Even though they have appropriate venues, their geographic position would seem to pose an obstacle to the development of this type of event within their territory, thus explaining the low rate of festival activity there. More distant regions, on the other hand, are well represented within our sample, hosting 10 festivals (23%). Some of these regions, though supposedly "in the middle of nowhere," have even been able to develop a solid national and international reputation. We can suppose that the existence of many of these festivals is tied to their regions' desire to affirm itself and develop a dynamic cultural life within their community. There is also the question of attracting audiences and tourists from elsewhere in Quebec or abroad, doubtlessly encouraged by governmental policy.

The festivals making up our sample are, on average, 18 years old, and evenly distributed in terms of age: 30% are under 10 years of age, 40% are in the intermediate age bracket of 10-20 years, and 30% are over 30 years of age. This diversity in age can be found in all of Quebec's regions and concerns all

1. We are using the typology of "membership regions" developed by Harvey and Fortin (1995).

musical styles, with the exception of the 11 world/traditional music festivals, none of which are over 10 years of age.

There are also many contrasts concerning the number of shows being offered. Small festivals (16% of the sample) with fewer than 25 concerts per season coexist with larger festivals (23%) offering at least 100 shows. In reality, this figure ranges from 10 to over 600 concerts. The majority of festivals (61%), those offering between 25 and 99 shows, are situated between these two poles.

Audiences

The 43 festivals of our sample estimate that, taken together, they attracted 5.6 million audience members (paying and non-paying alike) in 2011 with an average of 340,000 spectators per festival. The number of spectators per festival ranges from 3,000 to 1.9 million. In this range, 25% of these events can be categorized as "very large" festivals in terms of their audience sizes, a significant increase from the results obtained by 2008 data (cf. figure 1). Indeed, this increase is larger than it was for the entirety of the 347 festivals in the European sample.

Figure 1. Distribution of festivals by number of audience members in 2008 and 2011 (%)

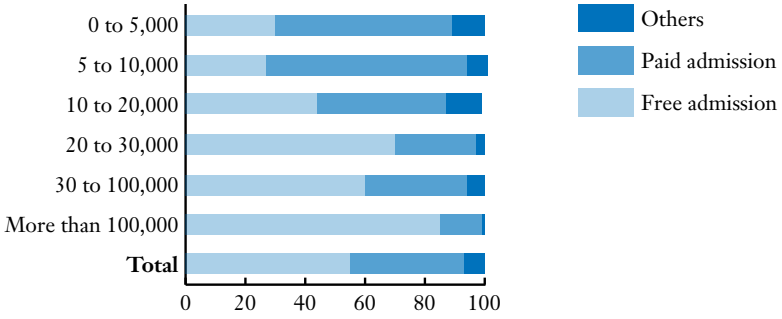
Audience size	Quebec		Europe	
	2008	2011	2008	2011
Less than 3,000	–	–	21	16 -
3,000 – 5,999	6	13	25	22 -
6,000 – 19,999	45	35 -	22	25
20,000 – 79,999	36	28 -	24	26
More than 79,999	12	25	8	10
Total (%)	**100%**	**100%**	**100%**	**100%**
Missing value	7 (N = 36)	0 (N = 43)		

Audience sizes are not unrelated to policy regarding free admissions. For the 43 festivals in our sample, free admissions to shows covers 55% of all festival-goers. As figure 1 demonstrates, it is clearly the largest festivals which have the highest percentage of free admissions, reaching 85% of total admissions for festivals which estimate the presence of more than 100,000 participants in 2011.

Festivals attracting more than 100,000 participants take place largely in Montreal and Quebec, or in nearby areas. On the whole, festival audiences prove to be relatively older. 58% of the festivals identify the dominant age of their participants at 40, while the 26 or younger age group is dominant in

only 9% of the festivals, essentially rock/pop events. These results are consistent with trends identified during studies of cultural practices, namely the older age of general concert audiences and the younger age of audiences for rock compared with other musical genres (Québec, MCCCF, April 2011: 14). Finally, we can observe that the majority of our festivals (74%) draw more than 50% of their audience members from their municipality or region, while a quarter of them (26%) draw a majority of their participants from outside the region, either from the other Canadian provinces or other countries.

Figure 2. Partition of entries (free, paying and others), in 2011



Finances

The 43 festivals that comprise our sample are non-profit organizations, a status often required in order to be eligible for public funding. Governmental subsidies (on all three governmental levels) represent 20.4 million dollars in 2011 (or 24% of total revenues), while sponsorships and patronage together represent 27.5 million dollars or 33% of the total. Ticketing generates 22.6 million dollars, or 27% of the total. If the percentage of revenue generated from ticket sales is relatively similar to Europe's (26.5% for the Festudy sample), this is not the case for sponsorship[1] or patronage[2] which, in the Festudy sample, is situated at 13.6%. Sponsorships account for 20% of the budget for one-third of the festivals and between 31-50% for another third.

This general approach to festival financing does hide important differences in the amount of revenue for individual festivals. Some organizations receive a

1. In Québec, the term "commanditaire," preferred to that of "sponsor," signifies "an individual or corporate body providing material support to an event, a person, a product, or an organization in order to benefit directly from advertising opportunities." (Cf. Office québécois de la langue française, 2007: http://www.gdt.oqlf.gouv.qc.ca for the French definition).

2. According to the Groupe de travail sur la philanthropie culturelle (June 2013: http://www.finances.gouv.qc.ca/documents/autres/fr/AUTFR_PhilanthropiqueCulturelle.pdf), cultural patronage is relatively low in Quebec. Most of the amount which our festivals have specifically indicated as coming from patrons is probably derived from sponsorships.

few thousand dollars per year to produce their festivals (the minimum amount being $21,800), while others have several million dollars at their disposal. The ratio of each income source to the total budget also varies according to the festival's geographic location. Subsidies represent a higher proportion of the total budget in more distant regions (38%) than they do in other regions. This situation is reversed when we look at ticketing. Here, it represents 8% of total revenue for peripheral regions and 12% for more distant regions. However, for the other regions, it represents one-quarter of the total budget. Sponsorship percentages are higher in peripheral regions (representing 46% of the revenue) and more distant regions (38%), but also represent one-third of the revenue in the two other regions (central and intermediate). There is also variation by musical genre. For example, sponsorship represents a larger share of the budget for jazz/blues (41%) and world/traditional (35%) than it does for other genres. Ticketing is a less important income source for world/traditional music (9%) and, as expected, much higher for rock/pop (36%).

As with revenues, there is also a high degree of diversity for festival expenses. Here, the median is situated at $500,000, while the average is in excess of $2 million. Artists' expenses and fees constitute the single largest expense item, with amounts ranging from $20,000 to more than $8 million and an average of $598,216. These are followed by technical, communication, and administrative expenses, all of which are approximately of the same amount and represents roughly the same percentage of total expenses. This comes to $16 million or nearly 18% of the budget (Figure 3).

Figure 3. 2011 expenses by item (millions of CAD) for participating music festivals (= N1)

	N[1]	Median	Average	Total	Percentage of total expenses
Artistic expenses and fees	39	110,745	598,216	23,330,443	26.8
Job-related expenses, artist accommodations	38	27,925	282,621	10,739,616	12.3
Technical expenses	39	70,000	410,290	16,001,307	18.4
Communication expenses	39	90,000	409,759	15,980,589	18.4
Administrative expenses	39	99,437	408,220	15,920,591	18.3
Total	**43**	**500,000**	**2,024,630**	**87,059,087**	**94.2[2]**

1. N = Number of festivals responding for each expense item.
2. Around 6% of total expenses could not be assigned because four festivals only provided their total expenses without breaking them down by item. A fifth festival did not furnish information for one of the items.

Festivals and human resources

The question of human resources is highly important because of the costs involved for festivals and the difficulties they have in retaining experienced personnel. This study allows us to shed some light on this aspect of festival life. Globally, 7,974 people work for the 42 festivals that furnished staffing data. This figure includes a high number of volunteer workers. The average per festival is 190 people, while staffing sizes range from 10 to 1,012. In 2011, 20 festivals (48%) had fewer than 190 employees (including volunteers), 16 (38%) had between 100 and 499, and 6 (14%) had more than 500 employees (more precisely, between 508 and 1,012), 4 of which took place in Montreal.

It must be noted that the size of the organization varies according to the time of year. Indeed, a large majority of the workforce (80%) only works during the festival season itself, while a small minority (4%) work throughout the year. This seasonal character of work patterns does not show significant variations in terms of region or musical style, with the possible exception of classical music festivals. Here, 34% of their workforce is employed only during the festival season, while this figure ranges between 80% and 96% for the other festival categories.

Staff members do not all have the same work status, nor indeed are they all paid. The majority of them (54% or 4,280 individuals) are volunteers, while 29% are salaried and 12% are independent contractors. The remaining workforce is made up of interns (less than 1%), or employees supplied from other organizations (municipal employees, for instance, or from the private sector). If salaried employees represent the second largest group of workers after the ever-indispensible volunteer workforce, their numbers vary considerably from festival to festival. Out of a total of 2,320 salaried employees, more than 90% work for 19 festivals, all of which are situated in the 2 central regions, while 4 festivals have no salaried staff. The largest number of festivals (60%) have between 1 and 10 salaried employees, while the largest festivals can have up to 300.

Finally, we can look to how the 3,156 total festival staff (excluding volunteers) is distributed according to the type of work involved. Here, we can see that the service sector, along with the production and technical departments, hold the greatest number of full-time and part-time employees (2,256 individuals or nearly 72% of total jobs). Generally, these employees are hired shortly before the festival is to take place. For communications, festival administration and artistic programming, there are only 577 positions (18.3%) in the 42 participating festivals. Positions in festival administration and, to a lesser degree, artistic program development are certainly more "permanent," or at least long-term, than other positions.

Festival issues, objectives, and challenges

The development of new festivals does create new challenges, both in terms of supply and demand and in terms of their socio-cultural, political, and economic landscapes. There is the question of public funding, one of the key issues which festivals must constantly face, while the number of festival "players" is continually increasing and public money remains limited. This is complicated by the growing diversity of criteria which institutions and governmental bodies put in place to determine festival eligibility for public funds: the impact on the economy or tourism, audience-related criteria, or artistic quality, for example. At the same time, sponsors and others are also establishing their own criteria. How, then, will festivals succeed in reconciling these requirements with their own objectives? The festivals that have responded to these queries have very clearly indicated that public funding and private partnerships (likely associated with the limited amount of public money) are more important to them than questions of audience size and production costs. This study also shows which objectives festivals consider to be the most important. Their primary objective is to support new artists, followed by discovering new musical repertoires and works. Thus, the most important objectives are those that are artistic in nature. A closer look at other variables can allow us to answer other questions. For example, is the support of the local economy a shared objective, or is it mostly carried by the regional festivals, as a type of incentive strategy aimed mostly at local youth? Is tourism a larger preoccupation for those festivals receiving public funding from institutions with economic missions?

Finally, this image of Quebec's music festivals draws our attention to cultural organizations that must address problems associated with their smaller size. These problems are not only budgetary in nature but are also related to the seasonal character of this sector. These organizations must think on their feet and use all of their creativity to innovate. With their limited financial resources, this is the only way they can adapt to a constantly changing environment and to competition from other festivals. There is also the question of being open to the outside world. To what degree are festivals open to developing relationships with foreign media, artists, and audiences? How can we characterize the partnerships they develop, both in terms of their diversity and their scope? Some of the data obtained through our study, which we are unable to analyze here, leads us to continue our research along these lines in order to enhance our understanding of Quebec's music festivals in all their uniqueness and complexity.

Festivals, a journey from here to where a British perspective

Christopher Maughan

"I look upon it as the culmination of our British heritage. It had to be done and it's gonna be done" (Richards 2013).

The headline performance by the Rolling Stones at Glastonbury Festival[1] may have been remarkable for the fact that it had taken so long for them to play there, but perhaps more remarkable still was the media frenzy that accompanied it. This is a sharp contrast to how both the band and the festival were reviewed by the media in the 1970s when neither were part of the mainstream in the way that they are treated and valued today.

This essay will examine how the festival sector in the UK has changed over the past 70 years and, using the metaphor of life cycles, will offer an assessment of its future. It will draw on a range of research, some of which has been undertaken by staff at De Montfort University (DMU) on festivals in Leicester.

This choice of period is deliberate as it allows us to focus on the conditions which have influenced the development of the festival sector in the UK, conditions which reflect both local and global changes in social, cultural, political and technological life since the 1940s.

A unique history

Those readers who are familiar with the history of Glastonbury Festival may be aware of its close relationship to another icon of British cultural history, Stonehenge[2]. Glastonbury is 70km west of Stonehenge and in the 70s and 80s became a focus for the 'travelers' who would assemble in Glastonbury[3] for the festival following the celebration of the summer solstice at Stonehenge.

Stonehenge is one of the earliest sites in the UK where there is evidence of human ritual and celebration. Whilst its primary function is not known, its undoubted importance as part of human celebration of life, death, the seasons, and the stars invites comparison with the importance that we continue to associate with festivals such as Glastonbury or Edinburgh's festivals today.

1. The Rolling Stones were the headline act on the Pyramid Stage on Saturday 29 June 2013.

2. One of the most famous archaeological sites in the world, Stonehenge dates from around 3000BC and is the remains of a ring of standing stones set within earthworks. It is in the middle of the most dense complex of Neolithic and Bronze Age monuments in England, including several hundred burial mounds.

3. Not with the consent of the festival's owner, Michael Eavis (Aubrey & Shearlaw 2004; McKay 2000).

Edinburgh, one of the best known arts festivals in the world, has achieved its status in part because of its great location but also in part because, together with the festivals in Salzburg, Amsterdam and Avignon,[4] it provided a focus for the rebuilding of Europe after the second world war, through culture.

"Established to fill the cultural vacuum partly caused by years of war, such festivals became a means to cement international relations, a forerunner of what is now known as 'cultural diplomacy'" (Richard & Palmer 2010). Before the war ended planning was under way for the reconstruction that would have to occur. Sir Rudolf Bing had the idea for a major festival that could "*provide a platform for the flowering of the human spirit*".

At the same time, John Maynard Keynes was overseeing the transformation of a war-time experiment, the Council for the Encouragement of Music and the Arts (CEMA), into the Arts Council of Great Britain (ACGB)[5]. This was established in 1946 with the remit to "develop accessibility to and greater knowledge, understanding and practice of the fine arts."[6]

Initially ACGB's focus had a bias towards the arts in London and organisations with which Keynes had close ties such as the Royal Opera House (the only organisation to have been funded continuously since 1946/7), but the launch of the Edinburgh Festivals and plans for the Festival of Britain in the summer of 1951 brought ACGB into a closer relationship with a sector that has become a major feature of the cultural offer across Britain and the rest of Europe to the current day (ACGB 1946-53; White 1975; Verhoef 1995; van Geijn 1995; EFA 2009).

Figure 1. Arts Council of Great Britain, 1946-1952: art festival financing

Year	Amount of financial aid (€)	Financial aid to *the Royal Opera House, Covent Garden* (€)	Financial aid to *the Edinburgh Festivals* (€)	Other festivals (€)
1946/47	415,156	65,239	0	0
1947/48	507,676	116,244	11,862	0
1948/49	682,042	171,993	11,862	0
1949/50	711,696	201,647	5,931	0
1950/51	800,658	171,993	3,558	78,287
1952/53	800,658	314,332	5,931	3,443

4. Salzburg Festival, Austria, began in 1920 it was relaunched in 1945. The Holland Festival and Festival d'Avignon both began in 1947, the same year as the Edinburgh Festivals.

5. Arts Council of Great Britain, Arts Council of England, Arts Council England are used at different places in this essay as the organisation changed its name following several phases of reorganisation. In some places the generic term Arts Council is used.

6. Whilst we may think of ACGB and its successors as being driven by an arts agenda, Maynard Keynes himself acknowledged the role that the arts can play in challenging the giants of poverty and aspiration.

Figure 2. 1952/53 – Arts Council of Great Britain: Festivals receiving financial aid

Festivals	Amount (€)	Value 2011
Aldeburgh Festival	593	14,009
Bath Assembly	593	14,009
Cheltenham Festival of Contemporary Music	1,011	23,866
Edinburgh Festivals	5,931	140,097
Hovingham Festival	44	1,037
Swansea Festival of Music and the Arts	432	10,194
Kings Lynn Festival Committee	593	13,712
Canterbury Festival Committee	178	4,201

The figures 1 and 2 show the limited number of festivals receiving public funding in 1952 as well as the small size of the subsidies, especially when compared to those of 2012. For example, the Edinburgh festival received 2.8 million euros from *Creative Scotland*, or 20 times the amount it was able to obtain in 1952 from the ACGB. Today, festivals are a strategic but small part of the Arts Council's client list. In the festival sector as a whole, the majority are either funded through local authorities, by private sector support, by ticket sales, or combinations thereof. In 2007, over 80 festivals in England received financial support from Arts Council England (ACE). In 2013 the figure is around 60.[1] Its client list reflects ACE's focus on artistic excellence in contrast to the greater emphasis of most local authorities on access, participation, and community engagement.

Before the introduction of public sector funding in the late 40s and 50s, festivals that prospered did so through public support from their audience or patronage. An early example is the Three Choirs Festival which takes place in Gloucester, Hereford and Worcester and is recorded as active since1715. Others that still have a contemporary presence are the Proms which began in 1895, Blackpool Dance Festival (1920), National Festival of Community Theatre[2] (1927) and Glyndebourne Festival Opera (1934),

The identity of the festivals that are funded by ACE is illustrative of how the arts and cultural scene has developed in Britain in the past 60 years. Using a classical/folk/commercial typology, the first festivals that established a presence in the emerging sector were predominantly those that related to a more classical form: for example, Cheltenham Music Festival (1945),

1. ACE was unable to provide a definitive list of its festival/events/carnival clients, or the funding that it allocates to them, due to how it manages its client database.

2. Now the All England Theatre Festival. None of these festivals have the status of a National Portfolio Organisation with Arts Council England, which means that none are revenue funded; Glyndebourne receives some lottery funding for its touring work and the Proms are funded by the BBC.

Llangollen International Musical Eisteddfod (1947), Cheltenham Literature Festival (1949), and Tilford Bach Festival (1952). It was not until 1955 that other niche music festivals began to appear with the Sidmouth Folk Festival (1955) and, a decade later, Cambridge and Towersey Folk festivals (1965). Commercial music festivals[3] in the UK came later with the first Isle of Wight Festival in 1968.

There are several factors that contribute to this:
— Funding: the perception that work that related to the classical sector merited public sector support as a counter to the market and to preserve art forms that required different forms of cultural capital.
— The urban focus for most festivals: the concept of an audience is one that is most associated with the urban population which had grown since industrialisation (late 18th century) and which unlike rural communities was concentrated and was possessed of two important things – leisure time and the money to spend on it.
— Limited technology: the development of quality PA systems in the 1960s[4] was the missing ingredient required to present rock music to audiences of more than a few hundred in a venue or on record or radio.

By the 1970s, the commercial/folk/commercial typology was firmly established within the festival sector in the UK. To those named above can be added: Spitalfields Music (1976), York Early Music Festival (1977), and Huddersfield Contemporary Music festival (1978); Chippenham Folk Festival (1972) and Cropredy (1976); Glastonbury (1971), Reading Festival (1972), Monsters of Rock (1980)[5], and T in the Park (1994).

Festivalisation of the cultural sector: vectors of change

This expansion or 'festivalisation of culture' has been accompanied in the UK by change and development in:
— Associations/networks;
— Funding;
— Professionalisation;
— Legislation;
— Impact assessment.

3. Commercial does not necessarily mean that they were profitable but that they were not dependent upon public or private sector funding.

4. David Crosby of the Byrds can be heard commenting on the quality of the PA in the film of the Monterey International Pop Music Festival in 1967.

5. Since 2003 known as Download.

Associations/Networks

Figure 3. Organisations and membership

Organisation/Network	Year established	Focus	Members
European Festivals Association (EFA)	1952	Large festivals	91 festivals
British Arts Festivals Association (BAFA)	1976	Large festivals	113 festivals
National Outdoor Events Association (NOEA)	1979	Events industry	500+
Association of Festival Organisers (AFO)	1987	Smaller festivals, folk/ jazz	95 festivals
Independent Street Arts Network (ISAN)	1998	Outdoor arts practice/ services	16 festivals
Local Authority Events Organisers' Group (LAEOG)	2004	Local authority events	67 local authority members
A Greener Festival[1]	2007	Environmental practice	n/a
Julie's Bicycle[2]	2007	Environmental impact	21 associates, 450 partners
Association of Independent Festivals (AIF)	2009	Commercial festivals	40+

The growth in the sector was accompanied by the establishment of membership organisations such as the British Arts Festivals Association (BAFA) which was created in 1976 and was registered as an incorporated company in 2012.[3] Based on the same model as the European Festivals Association (1952), BAFA arose in response to the need for festival organisers to learn from one another and to develop a voice with which to lobby for increased support from public authorities. By 1976 the festivals sector included city wide festivals too such as the Brighton Festival (1966) and the Salisbury International Arts Festival (1973).[4] These multi-disciplinary arts festivals shared a lot in common with other larger urban, classical and choral music festivals, and today these constitute BAFA's membership

1. A Greener Festival: www.agreenerfestival.com, is an important association which promotes sustainable development practices and evaluates festivals, awarding the prize of "Greener Festival" for those candidates satisfying its requirements.
2. Julie's Bicycle: www.juliesbicycle.com, is a non-profit organization whose mission is to incorporate sustainable development within the economic model, that artistic practices, and the ethical code of the creative industries.
3. British Arts Festivals Association: www.artsfestivals.co.uk.
4. Brighton Festival: brightonfestival.org and Salisbury International Arts Festival: www.salisburyfestival.co.uk.

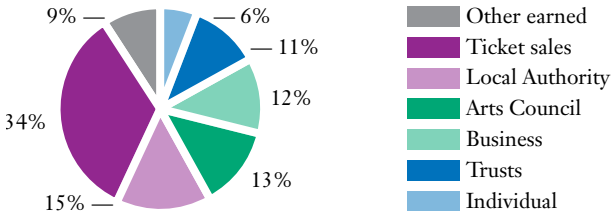
together with an increasing number of Science Festivals. BAFA did not, however, engage with the growing market of smaller, independent music festivals whose specific needs were addressed by the Association of Festivals Organisers (AFO).[5] More recently the Association of Independent Festivals (AIF)[6] has been set up to serve the needs of predominantly larger rock music festivals.

These three have a combined membership of 250 arts and music festivals. Alongside these the UK also has several organisations that focus on the broader events industry within which festivals are an important element. In figure 3, these are represented by NOEA, ISAN and LAEOG which include events and festivals that are managed by local authorities.[7] Of the 600+ music festivals that are estimated to run in the UK each year, over 300[8] are estimated (by DMU staff) to be managed and financed by local authorities in England, Wales, Scotland and Northern Ireland. The recent economic crisis is inevitably a threat to the future of this important part of the UK festivals' sector.

Funding

Festivals are funded through a mix of sources. A BAFA study in 2006-7 showed the following profile.

Figure 4. Income sources for BAFA members (2006-2007)



Plurality has long been the goal of arts organisations, but the economic recession that began in 2008 has had a major effect on festivals' sustainability as all sources including ticket sales have come under increasing pressure. The future of many festivals operated and/or supported by local authorities is a source of increasing concern, and 2015-2020 has been identified as the period when local

5. Association of Festival Organisers: w ww.festivalorganisers.org

6. AIF operates as an autonomous division of the Association of Independent Music (AIM)

7. National Outdoor Events Association: www.noea.org.uk; Independent Street Arts Network: www.isanuk.org; Local Authority Events Organisers' Group: www.laeog.org

8. A precise number is not known. LAEOG might be a source of a more accurate figure but it is a voluntary association for local authority officers and lacks the resources to commission a full study. Not knowing the number of festivals presented each year is an illustration of just one of the challenges for the festivals sector in the UK.

authority cuts may finally express themselves in reduced cultural outputs for municipal cultural venues (theatres, arts centres, museums) and local festivals. The reduction in funding for festivals is one problem, but the closure of venues in which the festivals can present their work is another cause for concern.

Data published by *Arts and Business* also raises questions about the sustainability of festivals in the light of changes in the climate for financial support from public and private sources. In 1994/95 and 2002/3, festivals received 8.94% (£7.4m/€8.57m) and 7.65% (£8.78/€10.17m) of all sponsorship income in the UK.[1] In 2011/12 Arts and Business research showed that the proportion of support from private sources that festivals attracted was 2.7% (Arts and Business, 2011).

Figure 5: Private funding of UK festivals

Private Investment in the arts 2010/11	£m	€m	%
Business	114	132	17.25%
Trusts & Foundations	174	202	26.32%
Individual Giving	373	432	56.43%
Total	**661**	**766**	

Source: Arts & Business 2012.

Whilst it was encouraging in an Olympic year that festivals were continuing to attract financial support, the challenge for the future is that the area of greatest increase over the past decade has been in 'Individual Giving' which other research indicates is an area in which festivals are performing the least well. Festivals appear therefore to be reliant on forms of financial support that are under the greatest pressure – public sector, business and audiences/ticket sales.

What the *Arts and Business* data also reveals is an increasing London-centric focus with 90% of all individual giving going to organisations in London, which also attracted 67.8% of business investment. Not only has the form of support become a challenge but so too is where a festival is based. Regions such as the East Midlands lack many head offices for multinationals and those based in London lack knowledge of the investment benefits of the arts outside of London, which includes the majority of this country's festivals.

In Leicester, for example, festivals have not enjoyed success in attracting significant sponsorship because such investment decisions are often made elsewhere. But in 2012, Dave, the TV channel and the '*Home of Witty Banter*',

1. In 2000 festivals attracted over 10% of all private sector support for Millennium projects but this fell swiftly in the following years.

chose to sponsor the Leicester Comedy Festival in a deal that will include 2014 and beyond, they hope.[2] This was interpreted locally as a signal that festivals and other arts events in cities such as Leicester could be partners with businesses looking to raise their profile in markets outside of London.

Professionalisation

An increasingly congested calendar as well as competition for audiences and funding partners have resulted in a tighter focus on what festivals do and how they do it. Up until 1988, funding awards were based around a one-year budget. That year, Arts Council of England introduced a new programme, the 'Incentive Funding Scheme', which encouraged its clients to work to a three-year business plan. This has now become the norm and introduced a discipline, strategic planning, that changed the whole way in which staff, directors, funders, audiences and artists thought about what the arts were for and, indeed, the culture of those organisations chosen for financial support.

In the 1960s, the dominant paradigms for cultural policy were those of *Democratisation of Culture* (top down) and *Cultural Democracy* (bottom up). Following the election of a Conservative Government in 1979, led by Mrs Thatcher, government policy for the arts changed to a more neo-liberal agenda which has been described as *Culture as Commodity*. The introduction of strategic planning reflected the view that the arts should be more independent of public sector support, should develop their partnerships with business, and overall should be more business-like themselves.

This period of 'managerialism' was followed by a further policy shift in which the arts were encouraged to demonstrate the benefits that they provide in return for their funding. *Culture as an Instrument of Social Change* was most identified with New Labour from 1997, but the seeds were sown by the Conservative Government of John Major from 1992. These changes did not, however, make things easier for festivals due to the increasing focus on legacy and social impacts. Festivals, many of which are *'here today, gone tomorrow'* organisations, often lack the resources (human and financial) to undertake the research required to reveal longer term social impacts or, more importantly, they lack the staff to ensure that any legacy benefits are understood and nurtured. In some respects the 'responsibility' for developing a festival's legacy lies as much with its audience as it does with the festival itself.

Some festivals responded to this change in management culture and practice by adopting a year-round programme of work in which the festival was one

2. Big Difference Company: www.bigdifferencecompany.co.uk; Dave's Leicester Comedy Festival: www.comedy-festival.co.uk.

part, albeit the main part. Examples of this include the Leicester Comedy Festival, which became a year-round organisation from around 1997-8. This event started in 1994, and the festival was its main focus until it began to develop projects outside of the February festival period in order to employ the skills and knowledge of its paid staff on other projects that earned money for the company. Variations on this theme can be found in the development of the Brighton Festival, the Salisbury International Arts Festival, London International Festival of Theatre (LIFT)[1] and Spitalfields Music.[2]

Brighton has the distinction of being a festival that had such a positive impact on the city that it was invited to take on the management of a venue, the Brighton Dome. This year-round activity has enabled the festival to focus on programming the distinctive site-specific work for which, with its Fringe Festival, it came to be renowned. Since 2007, the city and festival has hosted The Great Escape, a new music event that showcases emerging artists from all over the world. In this way, the festival continues to deliver on the its original mission, that is, "to stimulate townsfolk and visitors into taking a new look at the arts and to give them the opportunity to assess developments in the field of culture where the serious and the apparently flippant ride side by side."

Salisbury International Arts Festival in the 90s began to work on a four-year planning cycle and this led to the year-round employment of a core team of four. LIFT's commitment to learning and development has resulted in the creation of projects with different communities around London that linked together the biannual festival. Spitalfields Music similarly employed staff to deliver complementary programmes of classical music outside the annual festival, also underpinned by a strong educational ethos.

These changes are an indication of strategic change at the heart of many festivals as they develop their understanding of where they fit into the cultural ecology and use this understanding to develop a business model that will sustain them.

Legislation

One area of particular significance for many festivals, especially in their formative years, has been the rapidly changing legal framework within

1. LIFT was established in 1981 with a mission to throw open a window to the world, LIFT brings global stories to London, transforming the city into a stage and celebrating the experiences of the many individuals, cultures and communities that call London their home.

2. Spitalfields Music: www.spitalfieldsmusic.org.uk.

which festivals have been required to operate.[3] Festivals, especially music festivals organised in parks and other green spaces, were increasingly affected by legislation such as the Criminal Justice and Public Order Act (1994), introduced by the Conservative Government as a response to the illegal raves and acid house parties of the 80s and 90s. In some respects, raves might be an expression of an entrepreneurial spirit which in other contexts might be encouraged, but the 'antisocial/illegal' label that was attached to these music events resulted in political control which resonates today through licensing laws.[4]

In addition to employment law and the overall emphasis on staff as a 'resource' to be nurtured rather than exploited, festivals have also had to adapt to major changes in Licensing, Health and Safety, and Security. All of these have had an impact on the management culture of festival organisations which are now expected to carry out a risk assessment for all aspects of the festival when applying for a license. As part of this management/event plan, festival organisers are required to have appropriate levels of security and to ensure that staff employed in this capacity are suitably trained. The relaxed approach to be found at music festivals in the 1970s when, for example, many of those attending Glastonbury Festival climbed over the fence without paying are largely now a memory.

Impact assessment

As the demands on festival organisers to develop their management competence have grown, there has been a complementary change in attitude to festivals as a source not only of cultural pleasure but also of more quantifiable benefits. One of the most striking examples of this is found in the expectation that a festival might deliver significant economic benefits through the expenditure of the festival itself on artists, staff and other goods and services. In addition, some festivals have sought to measure the impact of the audience's own ancillary expenditure. Examples are to be found in studies completed for the Edinburgh Festivals (data for the Fringe Festival only is shown below), Notting Hill Carnival (Fleming 2003) and Glastonbury Festival (Baker Associates, 2007).

These three studies demonstrate that a festival has the potential to deliver benefits that go beyond those directly involved its activities to include the wider community in which the it is located. In the case of the Edinburgh Festivals, their 12 festivals can be demonstrated to have an impact on the economy of

3. The 'Pop Code' published by the Health and Safety Executive in the UK provides a good example of how the context has changed in recent years for the organisers of music festivals.

4. Illegal raves are still being reported in the British press as recently as June 2013.

the whole of Scotland as many of the audience members are international travelers/cultural tourists who explore other parts of the country before and/or after their stay in Edinburgh.

Figure 6. Festival impact for Edinburgh, Notting Hill, and Glastonbury

Festival	Established	Attendance	Duration	Estimated economic impact	Type
Edinburgh Festival Fringe	1947	2 million	25 days	£142m/€165m (2010)	Multi-venue, open site, some centralized box office. Free and paid events.
Notting Hill Carnival	1966	1 million	3 days	£93m/€108m (2003)	Street festival, open site, free with fringe events.
Glastonbury Festival	1970	150,000	4 days	£73m/€85m (2007)	Single, closed site. Paid event only.

Similar work has been undertaken in Leicester where researchers have been able to monitor several festivals quite closely over a period of years and this has provided source material for a deeper understanding of the purpose, benefits, and challenges of the festival sector in the contemporary world. This work began in 2002 and in 2003-4 during which Christopher Maughan and Franco Bianchini published reports[1] on 11 festivals in the East Midlands.[2] Some of these have become the focus of ongoing research.[3]

One festival from that research, the comedy festival, generates over £1m for the local economy from audience expenditure on meals and shopping. Summer Sundae Weekender (SSW)[4], a three day rock music festival, generates just under £1m for the local community. Such knowledge enables festivals to communicate more effectively with their local authorities and with business organisations as they negotiate levels and forms of support.

1. As well as individual reports on each festival the full research project was presented in a summary report and a full report which can be downloaded from: www.artscouncil.org.uk/media/uploads/documents/publications/festivalsandcreativeregion_php3G2xf0.pdf; www.artscouncil.org.uk/media/uploads/documents/publications/phpvY0hNv.pdf.
2. These reports were based on an analysis of surveys completed by audiences, stakeholders and local businesses. This work has been repeated for some of these festivals and a similar methodology applied to many other festivals.
3. Unpublished research now in preparation for publication.
4. SSW did not run in 2013, but plans are being developed for a relaunch in 2014. Summer Sundae Weekender: summersundae.com.

Figure 7. Economic impact of Dave's Leicester Comedy Festival and SSW

Festival	Established	Attendance	Duration	Estimated economic impact of the audience's ancillary expenditure	Type
Dave's Leicester Comedy Festival	1994	15,000	17 days	£1.33m/€1.53m (2013)	Multi-venue, open site, some centralized box office. Free and paid events.
Summer Sundae Weekender (rock/pop)	2001	5,000	3 days	£0.94m/€1.08m (2011)	Single, closed site. Paid event only.

Life cycles of organisations

An approach that researchers at De Montfort University are using to understand how festivals are responding to the dynamics and change in the cultural ecology is the life cycle model developed by Ichak Adizes (2004).

Figure 8. Adizes' Life Cycle: the four roles

Management Role	Key functions: to answer questions such as:
Purpose (P or p)	What are we going to do? *Effective/functional/short run*
Administration (A or a)	How will we do it? *Efficient/systematised/short run*
Entrepreneurialism (E or e)	What is needed? *Effective/proactive/long run*
Integration (I or i)	Who will do it, for whom, with whom? *Efficient/organic/long run*

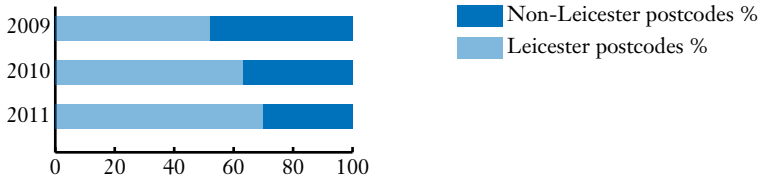
The model draws attention to the need for organisations to be aware of the dynamic between these four roles and how the balance changes or needs to change as an organisation matures. A new festival may well be strong in terms of its entrepreneurial strength (i.e. the founders may know a lot about a particular aspect of the music industry), but may be less effective in terms of management and administration or may have a purpose that is clear to the staff but which links only weakly to the aims of others from whom it may need to receive financial or other support.

One issue that research at Leicester has identified is how the audience profile changes through time. We have found that 'early adopters' of a

festival might include teachers who are present at many of these events in much higher numbers than in the population as a whole. These may be people whose motivation for attending is more driven by a search for something new more than is the case with other audience groups which are more conservative and are more 'followers' than trend setters. A new festival may lack the marketing competence and contacts to reach out to new audiences but might capture the attention of those attracted by a new event, unlike others who may need to see evidence of longevity and good reviews or simply begin tuning into the festival only after several editions have taken place.

Evidence of this may be obtained from looking at the home base of the audience. SSW started in 2001, and when research began in 2009, the festival was found to attract a large number of people from outside Leicester (70% of the sample). However, over the next two years the profile showed an increase in the numbers of local people in attendance.

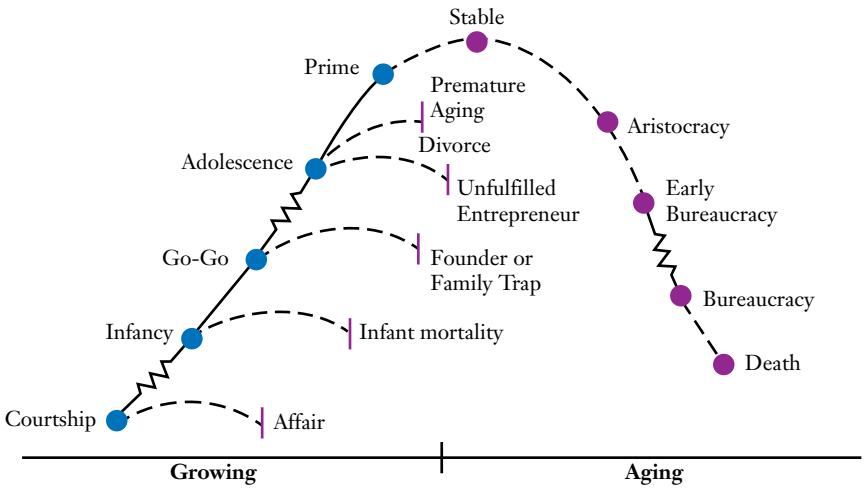
Figure 9. Summer Sundae Weekender – audience origins



Possible explanations for this are:
— SSW became of less interest to a travelling audience. A festival of 7,000 capacity has less buying power than festivals with audiences of 10k and more, so the programme is less reflective of the A-list names on the circuit that some may want to see/hear.
— There is more competition. Between 2001 and 2010, many festivals similar to SSW joined the market, and the audience may have chosen a more local festival rather than taking a trip to Leicester (saving them money on travel).
— Local resistance. We have noticed a tendency for local people to undervalue what is home grown. However, over time, reviews and other positive endorsements through social media have turned the heads of local people who have come to see that the festival is for them, too.

The figure below sets out the broad features of Adizes' model. Application of the model requires detailed understanding of an organisation across a wide array of factors, some of which have been noted above. Identifying where an organisation is in its life cycle is a product of the four roles.

Figure 8. Adizes' life cycle model



Adapted from books and website of Dr. Ichak Adizes: http://www.adizes.com/corporate_lifecycle.html.

Referring to the four roles in figure 6, a new organisation may have good entrepreneurial qualities (represented as 'E'); however, it may be weak in terms of understanding its wider purpose and where it fits in (represented respectively by 'p' and 'i'). It may also lack the management competence to develop its marketing and communications, its control of finance, or other related areas (represented by 'a'). Thus, it would be an organisation in the Courtship to Infancy phase in which a typical role profile is E, p, a, i. The entrepreneurial features are strong but others are weak. It would need to address these in order to move on through its life cycle.

Organisations in their prime are those that typically have strength in Entrepreneurialism, Purpose, and Administration but may still be weak in terms of Integration. Thus, a common role profile is E, P, A, i for an organisation at or approaching the Prime phase. This is the phase in which an organisation is operating at its greatest effectiveness.

SSW is a festival that was managed by a team that had many years of experience in the music industry and in running music festivals. Capacity issues aside, it could programme a good festival. It also had good management competence in terms of putting a festival together and made good use of the available facilities in Leicester. However, what is less clear is who the festival was for. Leicester is a multi-cultural city and projected to be the first city in the UK with a white minority. In that context, a music festival in which 90% of its audience members are white is out of step with the local population in which over 50% of those in the 0-25 age group are Asian.

A role profile for SSW may therefore be E, p, A, i. If the festival is relaunched in 2014, then the organisers will need to have addressed questions that our research raises about the purpose/aims of the festival in terms of the audience it seeks to attract and the programme that will achieve that. The issue of Integration is the role that Adizes identifies as the most challenging and the one that often matures last. SSW is an example of a festival in which the level of Integration into the music scene and the lives of local residents does not appear to be a strong feature.

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This essay has provided an overview of the development of the festival sector in the UK with a particular focus on music festivals. It is a selective and personal perspective which draws attention to some features (strengths and weaknesses) of the festival sector in the UK. Using a life cycles analysis of organisational development, the essay has identified some challenges for future sustainability.

At the present time festivals, along with much of the cultural sector in Europe, are experiencing uncertainty due to the economic recession. Since 2008 this has resulted in a reduction in funding for the arts from public and private sources. The exception to this has been the increase in individual and private donations, but this has not been a strong feature of the income streams of festivals to date.

Prior to this (from 1970 to 2008), the festivals sector had enjoyed a period of sustained expansion in the number of festivals being developed, accompanied by major changes in the management context. Festivals, as well as being important for their artistic content, were now substantial businesses with huge responsibilities for their audiences (their safety, their pleasure, their travel plans), the artists they engaged, and the integrity of the local area. Increasingly, they were expected to deliver measureable benefits to the local area, economically, culturally and socially.

Such changes have presented festival organisations with major challenges some of which are noted in the earlier, brief discussion of Adizes' life cycle model. This model uses knowledge of four management roles to indicate where an organisation is on its life cycle. When applying this model to the British festivals sector, it is possible to identify a cluster of festivals that are operating at the Prime phase. These are the festivals that have 'survived', such as Edinburgh International Festival and Glastonbury Festival, and which have demonstrable strength in terms of their artistic programmes, their appeal to

their audiences, and their relationship to their local context. This is not to imply that everything is perfect. Glastonbury Festival did not run in 2001 due to Mendip District Council declining a licence application because of 'fence jumpers' in 2000. The organisers overcame the problem through partnering with Festival Republic and overhauling their security arrangements.

The changes that have occurred since 2008 have tested the business models of many organisations. The life cycles model also provides a way of examining these, and this essay has identified one particular role, Integration, as being a key indicator of long term sustainability. In part, it is related to the way in which audiences are engaged and developed. Festivals are fundamentally for the benefit of the audience that attends and it is important that this be prioritised by festival organisers (and from our research it would seem that many do not do this). For example the issue of the audience experience and the extent to which it is intrinsically significant and a product of understanding the liminal/liminoid features of a festival should feature in the planning and evaluation of a festival.

Similarly, festivals need to be clear about where they fit into the local cultural ecology. Festivals can be a vehicle for challenging silo thinking which, left unchallenged, can characterise the way in which culture is managed. Indeed, this can block the development of partnerships and synergies which help to structure how culture is presented and experienced. Festivals should provide the opportunity to 'think outside the box' for organisers, partners, artists and audiences as well as encourage us to rethink some of the bigger questions such as what it means to be a member of a particular community.

Leicester is currently preparing a bid for the UK City of Culture programme in 2017. Should the bid succeed, many of the issues and questions noted here will be the focus of this programme. It will also test the ability of local promoters, venues, the city council, and the business community to work together to develop a programme that is a 'life changer' for the city and its people. Integration will be fundamental to a successful bid and to the city for the coming decade.

The Festival Landscape in Sweden

Sara Tannå

Historically, there have certainly been practices similar to the festival form, often bound to the summer season, prior to the mid-1900s. However, it would seem that the arrival of more contemporary festival practices remains a post-WWII phenomenon, probably influenced by the development of cultural expressions in neighboring countries such as Finland (Lidström 2008).

The earliest music festivals in Sweden took place in the 1950s and 1960s. This was when a large number of events termed as "summer festivals" were developed, mainly in the fields of classical, jazz and folk music. Notable examples were *Musikveckan i Östersund*, *Musik vid Siljan*, and *Musik och Konstveckan i Junsele*. In the 1970s, other types of music festivals flourished through the efforts and initiative of the group *Svenska Musikrörelsen*, falling under the musical category of *proggen*.[1] This culminated in *Alternativfestivalen* 1975 and the *Tältprojektet* a few years later. From this point on, festivals became more specialized in terms of musical genre, dedicating themselves exclusively to chamber music, electronic music, or folk, for instance. Eventually this would lead into an era of large rock festivals, with the *Hultsfredsfestivalen* at their head (Arrangörer på musikområdet 2013). The number of music festivals has increased markedly in the last decades, and festivals have become an established form expression within the event industry as a whole. The prevalence of festivals in general – regardless of the mode of artistic expression they privilege – is increasing. However, music festivals are the most visible within mainstream media and public consciousness (Nilsson 2008). Nevertheless, this has not been successfully translated into political or financial capital.

Today, approximately 40 music festivals are members of the national association Swedish Music Festivals (SMF), formed in 1988 on the initiative of several northern festivals. Over the years, other music festivals have become members of People's Parks and Community Centers (in Swedish, *Folkets Hus & Parker*), a national organization that includes a vast spectrum of establishments and activities. People's Parks and Community Centers (PPCC) listed 13 festivals on their webpage in 2011 and, as of 2013, they list 28 festivals[2]. It would appear that annual changes in association membership mirror broader

1. Not to be confused with the genre of progressive rock, Proggen was a movement influenced by the hippie movement and the youth revolts of the Sixties. Musically, a multitude of genres were represented.

2. http://www.fhp.nu/festival, People's Parks and Community Centers website, retrieved 1/3/2013.

changes in the festival landscape as new festivals arrive while others undergo fundamental changes, even failure. At least one-third of PPCC's current members are for-profit music festivals operating within commercially strong music genres. Examples of these would be *Way out West*, *Peace and Love*, and *Hultsfredsfestivalen*. The remaining festivals are more appropriately described as city (or street) festivals mixing different forms of artistic expressions. The vast majority of Swedish festivals – indeed, almost all of them – take place during the summer, typically between the months of May and September. In recent years, a few winter festivals have appeared, such as *Vinterfest*.

The organizational models adopted by festivals are varied. There are festivals organized by municipalities and various types of cultural institutions, as well as private non-profit and private for-profit organizations. More and more public institutions are "outsourcing" or externalizing projects such as festivals and other events from the main organization in order to minimize or spread risk and, sometimes, in the hope of simplifying a festival's decision-making structure. This can complicate the question of ownership and power. The common observation that the festival sector is dominated by non-profit organizations has been confirmed by the researchers Tommy D. Andersson and Donald Getz, who add that this appears to characterize many countries besides Sweden (Andersson & Getz 2009a), as we have also seen in the first part of this work.

Festival Policies

Swedish cultural policies toward festivals

From a public policy standpoint, modern cultural discourse in Sweden finds its origin in the 1972 report "New Cultural Policy" on which the government based its 1974 decision[3] establishing "cultural policy" as a separate administrative area. The goals and arguments presented in this document have been highly influential in the organization of the cultural infrastructure as well as the priorities associated with it. As part of this policy, cultural institutions underwent major expansion (Larsson 2003). Festivals are not mentioned, perhaps because of the strong emphasis on institutions and the relatively low prevalence of festivals at that time. Swedish policy for the arts had, and continues to have, a strong focus on public financing with institutions as providers. This is seen as a solution to the overall goal of reaching all citizens and eliminating class differences in accessing costly cultural events.

In political discourse, arts funding policies have been inextricably linked to social policies. Some forms of art have become nationally acceptable from a

3. Den statliga kulturpolitiken (1974). Stockholm (Kungl. Maj:ts proposition 1974:28).

qualitative standpoint while others are excluded, meaning they have to rely mostly or solely on commercial financing. In general, this has meant that some musical genres (typically those requiring artists to obtain higher education degrees) are considered of interest because they provide an income for educated practitioners and thus, by definition, must be of high artistic merit (Larsson 2003).

Since the 2006 shift in power from the Social Democratic Party to the Alliance (a coalition of four conservative parties), there has been an effort to change both the cultural infrastructure as well as the goals of cultural policy, thereby replacing the agenda set in 1974. Festivals are, however, still largely invisible in national public policy. In more recent public documents, festivals are indeed mentioned, but only briefly and with other forms of musical organizations. Recently, the Swedish Arts Council produced a report on concert producers in which they underlined the importance of "national support for festivals that are considered to be of national importance from an artistic point of view or from the standpoint of citizens" (Kulturrådets skriftserie 2013:3 – p. 45). They suggest appointing a committee to decide whether certain independent music organizers merit public support.

Many existing festivals strive to become an established part of the cultural offering and therefore wish to secure sustained financial support through a degree of institutional recognition. Public grants on a national level are typically allocated only to organizations that produce concerts throughout the entire year. It is possible for festivals to receive national financial support, but they cannot apply specifically as festivals. Grants from the Swedish Arts Councils primarily target permanent and regular events with extensive concert activity, and this formula has been problematic from a festival perspective.[1]

Because festivals are not singled out as a specific form of cultural expression but are more seen as one organizational form among others (whether these involve music, literature, theater, etc.), they are not considered to be in need of festival-specific policies. Consequently, there is no specific regulation pertaining to festivals. Instead, rules are applicable in different cases depending on the specific situation, often making important issues subject to interpretation, a situation leading to uncertainty and inconsistency. An example can be found in the heated discussions between certain festivals and the copyright collecting society STIM. In Sweden, copyright compensation fees for music concerts are based on the number of visitors. This is problematic when festivals have many concerts scheduled simultaneously and open to all visitors. Of course, not all visitors can be present for every concert, but STIM cannot

1. I samspel med musiklivet: en ny nationell plattform för musiken (2010) SOU 2010:12 p. 125.

know which concerts visitors are attending. Festivals thus disagree with the formula STIM uses to quantify the audience. Another example can be found with the issue of police security services, where the line between private and public has sometimes been muddled. Events like festivals would appear to create opportunities for the police to charge for services that should be readily available to the public. This practice lies in a grey area, and judgment is made by the local police on a case-to-case basis.

When it comes to research studies, or even governmental reports, there is a lack of attention to the overall situation for festivals in Sweden or related public policy issues. Because of this, a study was commissioned by SMF. Bengt Lidström completed this study, entitled *Sommarrum för själen*, in 2008, and it compared cultural policy, festival financing, and festival organization in three Scandinavian countries. Lidström concluded that the growth of political and financial support, both for festivals and festival associations, has been faster in Finland and Norway than in Sweden. Indeed, he found that festivals are largely invisible in Swedish cultural policy. He also argued in favor of growth in the festival sector and the event industry by showing that there are alternatives in the cultural field to institutional support.

Regional and local government

Starting in 2012, the newly created Swedish Agency for Cultural Policy Analysis (Myndigheten för Kulturanalys) has taken over some of the Swedish Arts Council's responsibilities and has the mission to "evaluate, analyze and present the effects of proposals and steps taken in the cultural arena."[2] One of their duties is to report spending practices. They conclude that the total public expenditure for culture was 23,771 million SEK in 2011. The sources of expenditures were as follows: 45% at the state level, 15% at the regional/county level, and 40% at the local level. Public expenditure on culture has increased by almost 25 percent during the 2000-2011 period, the biggest change occurring between 2000 and 2007. Spending has increased at a higher rate for the regional level, while municipal spending has been constant since 2007.[3] From 2007 on, spending has been relatively stable, a trend which may be correlated with the financial crisis. At the same time there is a shift in responsibility accompanying the decentralization of public funds from the national to the regional level. Now multiple-source financing is becoming standard, though co-financing requirements still exist within the realm of public finance (thus, receiving regional money might be dependent

2. http://www.kulturanalys.se/en/mission/, Swedish Agency for Cultural Policy Analysis website, retrieved 3/2/2013.

3. Samhällets utgifter för kultur 2010–2011 (2012) Myndigheten för Kulturanalys, Kulturfakta 2012:1 p. 7.

on first securing municipal support). Because there are no specific categories of financial support applicable to festivals as such, it is difficult to assess how much is spent on festivals. There is no quantitative information concerning how change in the overall budget has specifically impacted festivals. Festivals are more involved on the regional and local level as witnessed by the amount of festivals receiving support. The income structure for festivals in Festudy Sweden, for instance, shows that 80% of the sample had municipal support, 75% regional support, and 50% national support.[1] Local budgets have remained stagnant, and many municipalities now tend to prioritize larger events and arenas instead of smaller organizers.[2] This could have negative effects, especially for smaller festivals using mid-sized venues.

Regional music institutions as well as municipalities are themselves organizers of music festivals. Norrlands Operan, for instance, puts on *MADEfestivalen* as well as *Umeå Jazzfestival* every year, and *Festspelen i Piteå* is run as a foundation, the chairperson of which is a municipal representative. In *The music festival as an arena for learning* (2007), Sidsel Karlsen uses a case study of *Festspelen i Piteå* to show how festivals can provide the audience with a way to maintain/develop musical identities. She also demonstrates how they can be an outward manifestation of community identity as well as an opportunity for reinforcing the social and cultural identity of the host municipality. Municipalities and regions have become more conscious of their own image and of the importance of local culture in attracting tourists and new residents. In this context, festivals have become a way of creating an appealing image for a region or town through cultural manifestations. An example of this kind of symbiotic relationship is *Hultsfredsfestivalen* in the small town of Hultsfred. Indeed, this connection became problematic when the festival had to file for bankruptcy, especially since several types of services and educational programs were built around the festival. The festival has since been resurrected.

For musical institutions, festivals can be a way to bring other genres to their audiences' attention, especially those with which they are unfamiliar. Orchestras, for example, have fairly similar repertoires, mainly from the 19th century, but a small amount of contemporary music is performed during contained, one-time events, like *GAS-festivalen*.[3] There is also a new understanding that the festival form is efficient in different ways from static organizations. Newer texts have focused on festivals as a form suitable for promoting what is new in the musical domain because of its inherent flexibility (Nilsson

1. SMF data shows a similar distribution – 83% had municipal support, 60% regional, and 40% national.

2. Kulturrådets skriftserie 2013:3, p. 22.

3. Den nya musikens svaga ställning (2009) SOU 2009:16 p. 317.

2008: 66). This is probably related to an overall trend toward project-based work as well as public actors' increasing use of private ownership models. Managing many different stakeholders as income sources means balancing different values and interests, something that has long been a standard in the world of festivals. This way of working (in shorter but more intense bursts of activity) is becoming more common within the cultural sector and may contribute to the status of festivals.

Regions have varied problems to contend with, a fact also influencing how they allocate their funds. So far, the decentralization of the cultural budget has shown that some regions, especially the northern ones, still need an institutionalized structure because of the difficulties freelance musicians face in earning a living in these areas. Travel is a costly item, and musicians in Sweden typically cannot maintain a career on the regional or local level (Tanna 2012). This is a deterrence to de-institutionalization and encourages more project-based forms like festivals.

When seeking financial support, it is typically not enough for festivals to focus solely on the artistic merits of their program. It is usually necessary to include ideas about either democratization of cultural expression (through a change in venue or how activities are distributed throughout the year) or economic development in their application. The first of these, democratization, concerns reaching broader audiences. This has a long-standing place in art policy and is sometimes a formal criterion for support. Stina Westerberg, the CEO of the newly formed music institution *Music Development and Heritage Sweden* (Statens Musikverk), recently stated that festivals are a great way to open the door for new audiences because smaller genres and innovative music take place in a different environment from the regular concert halls.[4] Increasingly, festivals are used as an example when discussing entrepreneurial practice within the arts sector. The 'enthusiast' (*eldsjäl* in Swedish), so important in starting festivals, is compared to the entrepreneur, often in connection with Richard Florida's theories on the creative class and the geographical aspect of culture. This is a discourse that has penetrated some of the southern regions that now have bigger cultural budgets. Festivals are seen as cultural and financial engines, as well as an important means of "branding" the region. The expectation is that they will attract more residents and convert this attraction into larger regional markets and higher tax revenues (Johannisson 2010).

Festival economy

Much of the Swedish literature concerning festivals is not scientific research but rather reports from or descriptions of festivals, often chronicling

4. http://www.dn.se/kultur-noje/musik/unga-som-gar-pa-konsert-atervander-som-vuxna. News article, retrieved 28/2/2013.

the growth or change of the festival along with photographs and interviews with visitors, organizers, and musicians. In the popular press and mainstream culture, the public eye often settles on the big rock-pop festivals where visitors camp in the area. The discourse is often one of initiation, where participation marks the beginning of adulthood for young people, or with a strong focus on community and friendship. Due to a lack of recognition of festivals as a specific form within the public financial framework, there is no continuous or comprehensive collection of data on festivals. Research on festivals is also sparse, though there are a few studies pertaining to the fields of tourism and event management, primarily by researchers Andersson and Getz. Their research, which focuses more on economic issues and management strategies than on cultural or social meaning, used PPCC as their reference point, basing their sample on the member festivals at that time. At that point, in 2008, there were sixteen festivals with a dominant focus on music, 14 of which participated in the study.

SMF has collected data on their member festivals, providing us an overview of basic aspects such as the number of concerts, audience size, and financial sources. The data concerns 35 festivals during the 2010 season, with the exception of five festivals for which data comes from the 2007-2009 period. In comparison to the PPCC sample, SMF has a different configuration of genres, including chamber music, jazz, opera, and folk. The Festudy sample includes 14 festivals from SMF, 1 from PPCC and 8 other festivals.

A few comparisons can be made. In Andersson and Getz sample, the average age of these festivals was 14 years (with a range of 2 to 38 years), and only two festivals had gaps in their festival history (each missing one year). Their festival managers had an average experience of 4.5 year (with a range of 1-11 years) (Andersson & Getz 2008). This can be compared to the sample in Festudy where the average festival age is 24 (with a range of 4-66 years). In Festudy, the Swedish festivals report a total of 40 managers for 22 festivals, with an average of 10.5 years of experience (with a range of 1-28 years).

In the sample gathered by Andersson and Getz, we find that seven were run as non-profit organizations, while four were projects developed and owned by local governments, the remaining three being run by private companies. In Festudy the vast majority of festivals are non-profit, though these include a few festivals that are in reality run by public actors through private mechanisms. Three of the festivals are projects owned by local governments and public institutions, and only one can be categorized as for-profit.

It is difficult to assess the degree to which these samples are representative of the overall festival landscape. In addition a large number of long-term festivals

are one-time performances. Moreover, some of the festivals take place every other year or partly outside of Sweden (like Mali Sweden Voices).[1] Overall, the Andersson and Getz sample is fairly small and does not include older festivals, while the Festudy sample does not contain enough for-profit festivals and especially events within the rock/pop genre.

These studies show differences between festivals based on ownership status. Public festivals seem to survive for a longer period of time than non-profit or for-profit festivals. Public festivals are also by far the largest in terms of visitor numbers. However, in terms of staffing figures, these three groups appear to be roughly similar. The non-profit festivals have fewer year-round employees (on average, 2 employees) than the other two groups (5 employees) but use many more volunteers and considerably fewer seasonal employees during the festival (Andersson & Getz 2009b). Public, non-profit, and private festivals seem to offer similar festival experiences and have similar missions, but they differ considerably in terms of revenue sources, cost structure, corporate sponsorship, and decision-making processes, with perhaps the main difference being the cost to consumers. Overall, the festival sector is considered to show results similar to those found in studies of other mixed industries (Andersson & Getz 2009a). Andersson and Getz further propose a model of festival institutionalization based on ownership. Their results show differences between the three models (public, nonprofit, and private) related to payroll costs, decision styles, volunteer involvement and service quality (Getz & Andersson 2009). Sidsel Karlsen and Caroline Nordström also provide empirical support for a model in which institutional status influences stakeholder management (Karlsen & Nordström 2009).

Financial support and spending

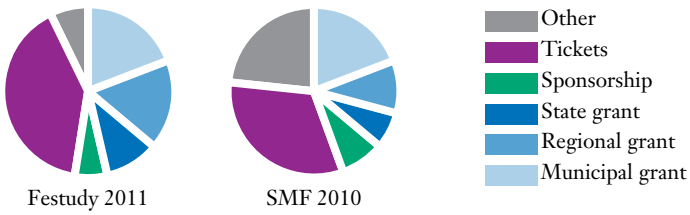
There is a large degree of diversity in public funding sources for festivals. Some festivals incorporating theatrical elements can apply for financial aid on the basis of being "a free theatre group." Two festivals that are members of the SMF have been given grants based on their 2014 participation in the European Capital of Culture program. Others, created and run by institutions (such as museums), are able to apply specifically for financial aid from a specifically designated fund. In Sweden there are also national music associations associated with a specific genre (jazz or chamber music, for example) that disburse public funds on behalf of the state to their own members. Festivals organized by an association member (person or organization) can use funds for year-round activities or to organize a festival.

Andersson and Getz (2008) report that a group of 14 Swedish music festivals believed they were most dependent on the following, in order of importance:

1. Kulturrådets skriftserie 2013:13, p. 28.

ticketing, municipal funding, services provided by the police and other public agencies, and the participation of nationally recognized artists. They considered sponsorship and grants from the central government to be somewhat less important, suggesting that the level of state support is low. It is also clear that festivals in the public sector were not overly concerned about municipal funding. Since they perceived themselves as institutions, they could therefore count on permanent support from the local government. This research also provided data on the averaged sources of revenue as a percentage of the total budget. This showed that ticket sales represented approximately half of the income (47%), followed by local funding (22%) and other income sources like food sales or merchandizing (19%). Corporate sponsorship levels were fairly low, representing 10% of the overall revenue.

Figure 1. Income sources from the Festudy Sweden sample (2011) (left) and from SMF members (2010) (right)



The numbers collected by SMF from 35 of their members show that overall revenue amounted 95,569 MSEK (approximately 6.8 million euros) with one-third coming from ticket sales (32%). Sponsorships accounted for less than 10 percent (8%), and the level of state support was also low (7%). The Swedish results in the Festudy sample show a similar income structure, but some significant differences can be seen: ticket sales account for a larger share of the overall revenue (40%), as do the regional grants (17% compared to 10% in the SMF sample). However, this contrast could also be due to the stricter definition of "region" within the SMF study.

In a four-country comparison in terms of perceived dependency, reliance on corporate sponsors was uniformly low, although the lowest rates were to be found in Sweden (Getz & Andersson 2010). With regard to title sponsors (sponsors whose names appear prominently before the title of the festival), Andersson and Getz found no examples within their sample. Publicly owned festivals and private for-profit festivals have developed a higher degree of sponsorship funding than their non-profit counterparts. The type of sponsor also varies with the status of the festival: private festivals have smaller private sponsors while public festivals are sponsored by other state-owned companies (Andersson & Getz 2009b). Cultural sponsorship is underdeveloped but

well suited to the festival format. Because festivals are limited events, cultural sponsorships represent a financial source with large potential for development. In figure 2, we can see that 71 percent of SMF festivals that participated in the 2010 survey received income from sponsors. The total amount of money accrued from sponsors is equal to the amount of public support from the regional level in Sweden. In the Festudy sample, 15 out of 23 festivals reported sponsorship income, 5 reported no income from this source, and 3 did not answer this question.

Figure 2. Public financial support and income* for SMF members
Sample data distributed by region --% in thousands of euros (1€ = 9.63 SEK)[1]

Total sample: 35 SMF festivals (data from the 2010 survey)					
	Amount of public financial support			**Income**	
	Municipal	**Regional**	**National**	**Sponsors**	**Ticketing**
Number of festivals	29	21	13	25	34
% of festivals	83%	60%	37%	71%	97%
Median	17 (€)	9 (€)	31 (€)	10 (€)	29 (€)
Mean	32 (€)	29 (€)	140 (€)	26 (€)	125 (€)
Total amount	916 (€)	605 (€)	1 823 (€)	638 (€)	4 260 (€)
Norrland: 261K km², 54 municipalities, 5 Landsting, approx. 12% of national population.					
Number of festivals	8	4	4	8	8
Median	31 (€)	7 (€)	17 (€)	11 (€)	35 (€)
Mean	50 (€)	7 (€)	17 (€)	13 (€)	39 (€)
Total amount	125 (€)	29 (€)	68 (€)	52 (€)	142(€)
Svealand: 91K km², 96 municipalities (incl. Stockholm), 7 Landsting, approx. 40% of national population.					
Number of festivals	11	9	5	11	13
Median	26 (€)	8 (€)	104 (€)	13 (€)	30 (€)
Mean	36 (€)	25 (€)	280 (€)	44 (€)	276 (€)
Total amount	396 (€)	226 (€)	1 399 (€)	485 (€)	3 552 (€)
Götaland: 87K km², 140 municipalities, 9 Landsting, approx. 48% of national population.					
Number of festivals	10	8	4	6	13
Median	11 (€)	19 (€)	17 (€)	7 (€)	19 (€)
Mean	15 (€)	44 (€)	90 (€)	12 (€)	26 (€)
Total amount	145 (€)	350 (€)	357 (€)	71 (€)	335 (€)

* These grants and income sources do not represent the total budget since other grants and revenue sources also exist.

1. Non-recipients (and those who lack income from sponsors and ticketing) are excluded from the calculation of the mean and median figures.

Although the previous figures show that national support is fairly low for the festival sample as a whole, the total amount of local and national grants for SMF festivals is similar. However, it must be noted that local and regional support was broadly distributed (29 and 21 festivals, respectively), while national support was spread among 13 festivals. National support is thus significant for its recipients because it is a large amount distributed to only a few festivals. Indeed, roughly 90% of national funding in 2010 was allocated to only four festivals in the sample. In the SMF data, we can also see geographical differences with regards to finances. Geography is thus a factor meriting further research, especially in light of both the decentralization of public spending and the national goal of ensuring equal access to culture. Clearly, the median and average figures for festivals in southern Sweden are higher than those for Götaland and Norrland, both of which are large geographical regions rather than political and administrative bodies.

The Swedish Arts Council has signaled the importance of festivals within the tourism industry, noting that public financial support does not reflect the role of festivals in producing large musical events reaching broad audiences. This indicates the importance of the public sector in underwriting many of these events. Many festivals would not exist without this as it provides a significant amount of value.[1] Data collected by SMF, displayed in figure 3, suggest other peculiarities about the human resources.

Figure 3. Human resources (2010) for 35 SMF member festivals

	0	1 – 5	6 – 10	11 – 20	21 – 40	41 – 60	> 60
Year-round	19	14	1	1	0	0	0
Seasonal	1	21	4	9	0	0	0
Volunteer	4	3	2	11	6	6	3

To read column 2, 19 festivals have no year-round positions, 1 festival has no seasonal positions, and 4 have no volunteer workers. In column 8, we see that no festival has more than 60 year-round or seasonal positions while 3 have more than 60 volunteer workers.

We observe that 19 out of 35 festivals do not have year-round employees and that the majority (14) of those that do only have between one and five year-round staff members. Seasonal employment is also situated between 1 and 5 employees. No festivals have more than 20 year-round or seasonal workers, but more than one-third can count on more than 20 volunteer workers. Here, one can see the importance of unpaid work within the festival landscape.

Each of the festivals in the SMF sample, for instance, engages between 7 and 540 performers for one season. On average, as seen in figure 4, 132 performers

1. Kulturens icke offentliga finansiering, Kulturrådets skriftserie 2010:4. p. 4.

participate in the program. In comparison, events in Festudy sample engage between 18 and 850 artists, with an average of 182 per festival for 2011. This could of course be due to regularly occurring fluctuations or the sample's composition.

Figure 4 – Number of spectators, concerts and performers for SMF members
Data presented for total sample and distributed by region

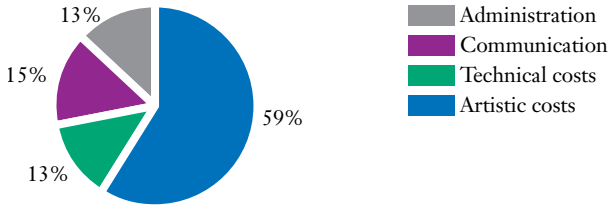
Total sample: 35 SMF festivals (national population 2010: 9 415 570)			
	Number of spectators	Number of concerts	Number of performers
Lowest amount	450	4	7
Highest amount	61,400	79	540
Median	2,900	16	83
Mean	6,505	21	132
Total amount	227,674	746	4,612
Norrland: 8 Festivals (approx. 12% of national population)			
Lowest amount	1,150	11	18
Highest amount	7,100	60	500
Median	3,425	20	96
Mean	3,825	28	180
Total amount	30,601	193	1,266
Svealand: 13 Festivals (approx. 40% of national population)			
Lowest amount	650	5	17
Highest amount	61,400	45	540
Median	4,000	16	80
Mean	11,836	16	130
Total amount	153,870	211	1,686
Götaland: 14 Festivals (approx. 48% of national population)			
Lowest amount	450	4	7
Highest amount	12,420	79	305
Median	1,911	11	70
Mean	3,086	21	107
Total amount	43,203	293	1,500

According to the SMF data, the majority of festivals have no year-round employees. The festivals that do have permanent staff typically have only one employee (with one notable exception, Dalhalla Operas has 14 employees). Overall, the human resources available to the SMF festivals are distributed in the following way: 3% are permanent employees, 25% are employed during the general festival period, and the remaining 72% are volunteers. Many of the bigger festivals also create opportunities for other non-profit associations,

such as sports clubs, to receive remuneration in exchange for taking on certain responsibilities.

Another financial feature continuously emphasized in government reports concerns the role of music festival in sustaining local and national artists.[1] This is can also be seen in the festival expenses reported within our Festudy sample:

Figure 5: Festival costs for the Swedish Festudy sample, 2011



The biggest expenditure is in artists' fees, a category twice as large as the others. Payroll expenses are included within the categories of technical costs, communications, and administration. In total, approximately one-third of the overall budget is used to produce the festival while two thirds are costs directly associated with participating performers. This is also why festivals consider high artistic expenses, along with bad weather and an overdependence on one income source, as their greatest threat (Andersson & Getz 2008).

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Although it is challenging to find and assess data on Swedish festivals, this may change in the future, especially when it comes to financial matters. The public cultural infrastructure is in flux, and it has been suggested that the national support currently distributed through national genre-specific associations may well be redirected to the regional administrative bodies that are now being formed (Larsson 2003). Such a development may make the study of festivals more accessible. This will certainly be the case for collecting financial data. This will make it possible to use current data from the SMF and Festudy samples in order to trace the consequences of this cultural reorganization of Sweden's festival landscape.

1. (SOU) 2010:12 p.22. See also Betänkande av Kulturutredningen, Statens offentliga utredning (SOU) 2009:16 p. 199.

General Conclusion

In this two-part work combining a study of nearly 400 festivals with an analysis of the national frameworks within which they are organized, we can see that the festival model does not necessarily correspond to our traditional understanding of them as short, artistically specific summer events. The world of music festivals shows change both in terms of festival activity and in terms of the public policies which govern them. In our conclusion, we will briefly summarize our research, beginning with our quantitative analysis and the points of convergence and divergence it has revealed. Then, we shall turn to the festival policies within each country, looking to see how they mirror this profile. Indeed, though each country displays its own unique characteristics, we can nevertheless see more similarities than we had initially expected to find. Finally, we will draw our general conclusions regarding the major issues facing music festivals today.

Festival change in three dimensions

To give some form to the many conclusions we have reached through our analysis of the 390 FESTudy festivals, we will be looking at three received ideas concerning these events: festivals as leisure activities, festivals as transitory and tightly focused events, and festivals as intermittent organizations run by a sole operator. This view no longer corresponds to the majority of festivals. Out of 390 events, only 9 meet all of these conditions (that is, summer festivals dedicated exclusively to a single musical style with no off-season activities), representing merely 3.3% of our sample. If we content ourselves with only two of these three criteria, and include those festivals with a single artistic style and no off-season activities, we find 81 festivals, or 1 event of 5. It would thus be prudent to subject our conventional notions to a more rigorous examination.

First, there is the idea that the festivalization of the cultural sector is closely associated with the leisure and tourism sectors. This implies two specific conditions: festival programming oriented mainly toward the summer, the time of year that contains the overwhelming majority of leisure activities; and a more commercially oriented approach to culture than that contained in cultural policies. However, the festival landscape that we have studied reveals itself to be much more nuanced, complex, and at times paradoxical than this conventional image would suggest. It is nuanced because, though summer is the peak festival season, festival activity extends far beyond this season. If the summer now only holds just over half of these ever-changing events, this is precisely because festival creation has displayed robust growth in the past years.

We will advance two reasons explaining why festivals are no longer limited to the summer. First, the growing number of festivals during this season has led many organizers to schedule their events during the months immediately before or after the summer. As we have already seen, the younger a festival is, the less chance it has of joining the rest of the summer pack in July and August. Second, festivals often play a role in the regular cultural season and work with local operators in the cultural sector. The summer is not always the best time for this since music schools are closed and a proportion of the local population is on vacation. Local authorities, which, as we have seen, are among the most steadfast festival supporters, can contribute to this extension of festival activity beyond the summer season, at the very least to ensure that local residents can also benefit from its programming. Paradoxically, the growth of festivals and the leisure economy in which they take part have led to the dwindling dominance of the summer season. However, we do see national variations on this trend. Countries with colder climates like the Scandinavian participants in our study tend to have a higher proportion of summer festivals than is the case for Spain or France.

As for the growing commercialism of the festival sector, we can see some truth in this claim since festivals are more often privately run organizations than is the case for cultural venues. It is not particularly remarkable that they are very often private actors in their own right because the cultural sector is strongly characterized by the presence of non-profit organizations. We can note that this legal status can equally apply to organizations that are virtually extensions of the public sphere as well as those that are run as commercial enterprises. Nevertheless, there are characteristics that can be linked to festivals with this status. First, ticketing receipts are clearly an important source of income for them, as are other commercial or para-commercial activities (merchandizing, catering, marketing, etc.). Second, private partnerships play a much greater role. Patronage and sponsoring are commonly relied upon by festivals, though the strategies they use are also changing. Patronage, for example, is seen as

the means for making up shortfalls in public financial support due to the economic crisis. However, patronage levels have not been sufficient to do so, and many patrons and sponsors increasingly pressure festivals to demonstrate a return on their investment. Without limiting ourselves to the role played by those major sponsors who give their name to a festival, we can see that the classical model of a benign patron is being overtaken by the more exacting model of partnerships, and thus there is a deeper penetration of a more commercial vision of festivals.

Nevertheless, we cannot go to the other extreme by concluding that the festival world is entirely made up of private organizations. With very few exceptions, public authorities contribute to festival resources, though the levels and forms of public funding are very diverse, as we shall see later. If there is an organizing principle structuring the festival landscape, it is a mixed model depending on public financial aid for its existence. Moreover, festivals are more and more targeted by public cultural policy because their objectives correspond to the larger policy goals held by local or national authorities. Given this framework of cultural, national, and territorial objectives, festivals function as tools within a fairly standard policy paradigm: the democratization of culture, attracting new and different audiences, functioning as vectors of innovation and creativity, or protecting a musical heritage, among other possibilities. Our analysis of ticketing and free admissions policies, though showing a large degree of variation in terms of musical genre, shows this hybrid model in a new light, situating it at the meeting point between public policy and the marketplace. In other words, far from detaching them from the sphere of cultural policy, the private status of festivals makes them specific tools for achieving overarching policy objectives.

The second received idea concerning festivals is closely tied to the first: the transitory nature of these events when compared to permanent cultural venues. The shorter format of these events is indeed a key to understanding their success. It has also become one of the symbols of modernity which Zygmunt Bauman has qualified as "liquid" (Bauman 2011). Its grip over the cultural sector has become such that it has taken sway over the institutions that are the most well-established in the cultural calendar. They compete with each other to determine which will propose "feature events" and which will propose "day events", trying in this way to appropriate the advantages linked to transitory events. Paradoxically, while we could consider festivals as the origin and thus the very embodiment of this trend, we must recognize how nuanced this image has become. A festival schedules 45 concerts on average over the course of 10 days. This figure, which varies widely according to musical genre, can give us a basis for comparison: the calendar of a regular music season does not necessarily show more scheduled events.

More importantly, more than half of the festivals display two trends contradicting this image. The first is temporal in nature: one out of every two festivals schedules events outside of the official dates of its season. On the one hand, these activities are created to embed the festival more firmly within its territory: educational activities, other concerts etc, while, on the other hand, they increase the number of people exposed to the festival brand, now considered to have both cultural and commercial value. The second trend is linked to artistic matters. This same group of festivals has escaped from being too closely identified with its original artistic orientation, whether this is in terms of its music, instrumentation, or artistic discipline. Including other art forms in the program has become a common practice. Classical and world/traditional music programs now feature dance and theatre, while audiovisual events can now be found in rock/pop festivals. Likewise, it has now become commonplace to mix musical styles by holding a jazz concert in a classical music festival, a world music concert in a rock festival, or contemporary music in a jazz festival. These strategies reflect something that sociologists specializing in musical tastes have long recognized and to which we have already called attention at several points in this work: music audiences in general are strongly characterized by a high degree of eclecticism, even if it is expressed differently in various audiences or social groups. It is thus logical that festivals incorporate artistic diversification as a way to adapt to changing audiences. To express this in a musical metaphor, festival programming strategies are now much less tightly held to a standard and more open to variations on a theme.

According to the third commonly held image of a festival, we would expect to find an organization that is both singular and intermittent in character. By singular we mean that one often sees a festival as an adventure that is closely identified with its founder and dominated by his or her charisma. This would forge the festival's basic identity and make it less open to cooperation with other festival directors. They are seen as 'intermittent' because, in this view, the structure of a festival's human resources, in line with its ephemeral character, should mirror the sporadic and uinstable nature of a transitory event.

The idea of a festival organization as "singular" is far removed from the concrete conditions for establishing a festival. Of course, there are charismatic directors whose place in the festival world was acquired through their personal qualities, their inspiration, and their networking skills, and who do not work horizontally with their peers or with regional or local authorities. We can find examples of these "forces of nature" in every country, but the world has since evolved and a large majority of festivals must now develop their own legitimacy and cultural project. The chapter focusing on cooperation has shown three trends toward cooperation marking the end of a relative amount of isolation.

The first of these is cooperation among festivals, characterizing 56% of these events. While it is true that festival collaboration is more characterized by occasional exchanges (co-productions, exchanging information) than by structural links (the definition of a common strategy, resource sharing), it is nevertheless true of all musical genres and is more present with younger festivals.

The second trend is for cooperation between a festival and local, social, or cultural bodies. Partnerships have now opened doors that were once thought to be permanently closed to festivals: community centers, music schools, cultural venues, and heritage sites. This form of cooperation also characterizes the majority of festivals and is equally distributed among all musical genres and all festival ages. On average, a festival develops three such cooperative links.

Finally, the third form of cooperation is through the creation of festival associations. Note that this does not overlap with the preceding cooperative technique since very few associations are created on a regional basis except in countries where the regional unit is almost synonymous with national identity (Belgium, Quebec, or Catalonia, for example). In general, these associations are fairly young, very often thematically organized, and originating in a specific music genre before possibly opening their membership to a wider musical field. Depending on the country, they can resemble clubs, corporations, or platforms for influencing public policy, carrying out many activities, from lobbying through to commissioning studies. In many countries, several organizations coexist for specific musical styles and raise the question of cooperation between federations, especially with regard to public authorities.

As for the intermittent nature of festivals, this is the received notion that corresponds the best to the reality of the situation, yet it must also be nuanced. Without a doubt, temporary employment characterizes these events: only 5.4 out of 180 festival workers are employed throughout the year, and rarely are they full-time staff members. At the other extreme, 150 people are only employed during the festival, and a large number of these are volunteers.

These figures seem to provide overwhelming evidence for festivals as intermittent organizations. Nevertheless, we must also focus on the increasing level of professionalization and the more permanent character of human resources in the festival world. We have seen this in terms of the professional skills that a festival organization requires as well as the administrative models it adopts. These events are indeed professionalized enterprises with specialized personnel working in marketing and communications and thus are far removed from festivals that depend on a pioneer spirit and the good graces of transient volunteers. With regard to public relations, we have gone far in identifying the different tools available to festivals, and we have observed the

rapidity with which these events have adapted to new technologies, especially the digital world. Though characterized by a high level of temporary employees, festivals do indeed display an increasingly professional profile. Naturally, this depends on budget size, musical style, and festival age, but it does show us that this sector is becoming more stable.

The second factor involves volunteers. We would be wrong to see volunteer involvement exclusively as a means for festivals to adapt to limited financial resources. In practice, volunteering has also become an alternative way of participating in a festival. Indeed, it resembles a ticketing policy in which volunteers pay in kind in order to attend artistic events. Finally, it is also a means for a festival to participate in the civic life of an area throughout the year. Nonprofit organizations, and not their members, are paid for the services they have rendered over the course of the festival, and in this way, the festival contributes to long-term social projects. This different take on festival employment shows synergies between intermittent and permanent employment and between the vulnerabilities of a festival's legal status and its potential social force.

As with all received ideas, these three commonly held images of festivals invite us to study the reality of the situation. Many examples can be called upon to show that some of these characteristics persist in the everyday management of a festival and in the policies that address it. Yet, it seems to us that, for better or for worse, these ideas have become outdated in the contemporary festival world. If we do qualify our conclusions by stating that there is no universal and compelling festival revolution, it is because the festival landscape is inherently diverse and deeply marked by esthetic, economic, and historical differences, which we shall come to next.

Factors influencing the world of festivals

Our goal was to determine which factors have had a major influence on festivals, on the dynamics guiding them, on how they balance their budgets, and on their policies regarding audiences, cooperation, and employment. We began with the assumption that the nationality of a festival had without doubt only a relatively small impact within our comparative framework, though without disappearing entirely. As we will see shortly, we were not entirely off base in this assumption. What, then, are the variables that have emerged as particularly influential throughout this panoramic study of festivals? To synthesize our results, we can specify three in particular: musical genre, budget size, and festival age. A fourth variable, allowing us to compare public policies, brings us back to the national dimension of festivals.

One of the clearest points of convergence in the festival world is the predominance of musical genre over all other variables. It is this factor that explains

the similarities and differences between these events. To put it broadly, there are clearly more similarities between rock festivals in Sweden, Quebec, and Spain than there are between a rock festival and a classical music festival in the same country. Even if they are both situated within the same institutional framework, they belong to two distinct worlds. However, the same esthetic approach in two different countries will share fundamental characteristics in how they are created and what their future holds in store for them. This sheds light on the ambivalence of international collaborations between thematic and national organizations, which we can see in such associations as *De Concert* or *REMA* (the European Early Music Association). Indeed, this is because what is shared within these theme-based networks is of crucial importance to their members.

Musical genre has a significant influence on festival length (longer and less concentrated for classical music, shorter and more densely scheduled with rock), the number of concerts, and on employment, with higher volunteer presence in rock and world music festivals. It has slightly less influence on budget sizes, even though rock/pop festival budgets are much higher than the average. The median figures, however, give us a more nuanced picture of budgets, since there are large cultural operators artificially inflating the average within each musical genre.

It is when we look at income and expense structures that we can see real differences between these genres. Classical music and jazz/blues festivals receive more financial support from the public sector because they are often older than festivals of other musical genres. Rock/pop and, to a lesser extent, world music events receive a much lower level of public financing than the average. These festivals are much newer and reached maturity during a period in which it was much more difficult to obtain subsidies. Moreover, they are often considered to be closer to the market, and as a result of all of these factors, they do not have the same financial structure. Some of them are able to compensate for these lower levels of public funding by relying on festival-generated revenues and the financial contributions of sponsors. We have already noted that the variable of festival nationality can influence their income structures, and we shall return to this point shortly. However, the expense structure is very clearly influenced by differences in musical genre. Classical music festivals commit a greater percentage of their budgets to artistic and administrative expenses – on average, 75% of their total budget, compared to 62% for rock/pop – while the latter events have higher technical expenses – on average, 19% of the total budget, compared to 11% for classical music. Finally, since the nature of audiences is very different, especially with respect to age though not in terms of geographical origins (most audience members being from the same region), ticketing policies are very diverse: price reductions for students,

day or festival passes and individual concert tickets are the most frequent options, though much less common with the largest festivals of world music or rock. Many of the other conclusions we have reached in this work show the broad influence that the variable of musical genre has on this sector.

Other variables have a lesser impact, but they do provide for a more complete explanation of festival dynamics. Turning to budget levels, we can see that, in and of themselves, they have a large impact on specific areas in the sector. For instance, the "richer" festivals are often scheduled during the peak period of the summer season, and they use a broad array of communication tools, regardless of their musical genre. Of course, we have found a correlation between budget size and attendance figures, but this relationship is not as strict as we might imagine. For example, we have observed that some festivals possessing significant budgets – like festivals of lyric music – do not necessarily attract proportionally sized audiences, and their financial resources are committed to abnormally high costs for artistic creation and performance. All things being equal, festivals with large budgets are also those with the lowest proportion of public funding, even if for lyric music festivals this proportion represents several million euros. In terms of budget size, it appears that there is a critical point above which the percentage of public funding to total revenue does not increase. Finally, on the basis of the most recent data, we can conclude that the largest and smallest festivals are those that have suffered the most from public funding cuts, with dire consequences for some of the smallest events.

Festival age is an indicator with a smaller field of influence. We can see its influence when analyzing festival seasons, observing that the oldest events generally occupy the peak summer season, forcing younger festivals to schedule during the months immediately before or after. We can also see that the youngest festivals are those that make the most use of digital communication technology and that are more involved in cooperation with local authorities or with other festivals. This is probably linked to the fact the young festivals, most often found in the most popular music genres (rock, pop, world music, electronic music, hip hop, etc.) have younger festival teams, even though the age differences between these teams are smaller than one might have thought.

If these factors have an influence on the data we have collected, we have also noticed that the largest point of convergence for festivals in all countries, of all genres, and of all ages is, paradoxically, their diversity. Typically, in each genre and each country, there is a very small group of large festivals and another much larger group of medium-sized or small festivals. This is why the rock/pop festivals in our sample are far from copying the model used by massive events. Indeed, some of them prefer cultivating an intimate atmosphere. Likewise, classical music festivals are not always small, and every

country offers examples of festivals which can attract sometimes more than 100,000 festival visitors. The best illustration of this phenomenon is the recurrent discrepancy between average audience sizes, influenced by a very limited number of large events, and the median figures, which describe a more "central" reality. We can see similar contrasts in terms of budget size (on average, 860,000€, with a median of 273,000€), of human resources (on average, 180 people are employed in the festival, with a median figure of 51.5), of the number of concerts (an average of 45, with a median of 25), or attendance figures (on average, 37,824 festival visitors, with a median of 7,880).

We have already had the occasion to comment upon this difference between mean and median figures. However, we have also wished to go beyond merely indicating this discrepancy, which is why we have grouped together different indicators into various clusters or festival "families". Our analysis of these clusters both confirms and illustrates a structural feature of the festival landscape: a central cluster of 160 events in which the indicators tend to display average figures. We have also identified five other clusters that show differences in terms of public funding levels, free admissions policies, or budget size. Another cluster of four festivals presents the largest figures for all of the indicators and represents the smallest festival family. Nevertheless, it does illustrate the large degree of diversity characterizing the festival sector, calling into question comparisons between a 20 million euro event and a 200,000 euro festival of the same musical genre. The heterogeneity of our quantitative data persists for the variables of musical genre and nationality, and the difficulties we have encountered when trying to reduce it to a more manageable level show that diversity is indeed one of the fundamental characteristics of the festival landscape. One can conclude that the success associated with the label of "festival" lends itself to this diversity.

Where does the national variable fit in to this analysis? As previously indicated, we did not expect that festival nationality would realign our data in a meaningful way. Nevertheless, all things being equal, we grant that it does shed light on a number of important dimensions. The first of these is illustrated by the difference in festival size when comparing events in Quebec and Spain. It is evident from a substantial amount of the data gathered that Quebec's festivals are very different from the majority of European festivals. Quebec's festivals are much larger, and when we compare the average and median figures for Spain and Quebec, we can see that a Spanish festival attracts on average 10,000 visitors with a budget of 564,000€, while a festival in Quebec attracts nearly 50,000 visitors with an average budget of around 1.6 million€. Second, we can see differences in income structure. Quebec's festivals receive a much higher percentage of their income from sponsors (24% on average) than do their European counterparts (approximately 13%). We

can thus see a specifically European profile in which festival organizations are based on a mixed model, and their desire to decrease their reliance on public funding by developing private sources of income remains risky at best. In contrast, in Quebec, private funding appears to be much more available, though we do not know the extent to which this is specific to Quebec and not a more general Canadian and North American phenomenon. Of course, this does not mean that Quebec's festivals do not rely on public funds. On the contrary, the financial involvement of different governmental levels is as crucial here as it is elsewhere, as Claudine Audet and Diane Saint-Pierre have shown in their monograph.

There is another dimension influenced by the nationality of a festival: employment. First, the labor laws for each country impact how festival teams are constituted. This is particularly evident with respect to internships, the existence of a specific legal status for artists and technicians (with the French status of intermittent entertainment professionals, for example), or the ways in which organizations can lend personnel to staff a festival organization. Employment figures are also influenced by national differences in how non-profit organizations are structured. For example, the status of NPO in Spain is less advantageous than in other countries, which explains why there are a greater percentage of festivals organized as for-profit organizations. There is also the question of national culture, particularly in terms of volunteering practices. As Jorid Vaagland has shown in his chapter on Norway, volunteering is part of an active national tradition, as opposed to Spain where , as Lluís Bonet and Tino Carreño have shown in their monograph, the lower volunteer presence is due to its particular national history. Volunteering is thus much more closely associated with civic traditions than with momentary festival strategies.

Finally, the third domain in which national traditions show their continuing importance is public policy, which is strongly influenced by their history, by national trends and by the relative weight of different governmental levels. We have observed that the national substrata of federalized countries with strong regional identities tend to be more important in terms of the origins of artists, audiences, and public funding. Though festival nationality is not an important factor in differentiating events, the national context nevertheless represents an important strategic domain for festivals. One indicator in particular is strongly suggestive of this. When we analyze the cooperative strategies adopted by festivals, we can see that the overwhelming majority of their partners (more than 80%) come from the same country as the festival. In order to resolve what would appear to be a real paradox, we need to modify our original hypothesis by supposing that national festival policies are not drastically different, even if cultural policies are influenced by different cultural traditions or philosophies of governmental intervention (Scandinavia, Latin

countries, Eastern or Central Europe, Anglo-Saxon and North American countries). We will now turn to this issue, as we discuss the monographs of the second part of our work.

Festival policies as a paradox

When we consider the dynamics of national festival landscapes within their historical context, we are struck by two diametrically opposed trends. On the one hand, we can see that the history of festivals has been markedly different from one country to another. On the other hand, unique national characteristics, which are of crucial importance in how they concretize the different frameworks within which festivals operate, tend to be hidden by the points of convergence between festivals from different countries.

In terms of historical origins, the emergence of festivals in each country does not follow the same pattern nor does it occur at the same time. In general, we can discern three different precursors to the modern festival. First, we can look to popular festivities originating in the Middle Ages, as can be seen in Norway. Second, notably in Spain, we can trace festivals to religious ceremonies which have been both prolonged and transformed as they have become more secularized. Third, we can discern an artistic and political dimension which characterizes the development of the modern festival. Turning to another Scandinavian country, Kai Amberla reminds us that Finland's festivals were created to emulate the German model which was exported to the Baltic countries at the end of the 19th century. This German influence was also identified by Michel Guérin, Béatrice Reynaerts, and Isabelle Paindavoine as important in the emergence of Belgian festivals during the creation of the Belgian state. This relationship between national identity and festival growth can also be observed in Hungary prior to the second world war and in Quebec during the 1960s. This link between the artistic and the political also characterizes the first French and Spanish festivals. The differences between these countries is related to the varying importance of each factor (religion in Spain, secular traditions in Scandinavia, or the specific political and artistic contexts in other countries) and to more systematic period of festival growth. In every country, these three different genesis stories tell us more about the archeology of festivals than their systematic spread. Festival growth is universally associated with the post-World War II period, beginning with classical music events. Hungary, with its flowering of festival activity throughout the 1930s, represents a slight exception. With the 1960s, the festival sector was more exposed to new horizons: jazz, and then folk, pop, and rock music. In the 1980s and 1990s, there was a heightened intensity in the festival sector as these events became more popular, even commonplace. Of course, the specific dates and sequences of this timeline vary from country to country. At the same time that famous pop festivals were beginning in the USA and England – and

then in Belgium – the Gaullist regime instructed its prefects to obstruct their spread in France. Similarly, Franco's Spain only recognized the legitimacy of classical and folk music, used to shore up the international reputation of what was, at that time, still a dictatorship. In 1984, when the creation of thousands of new festivals accompanied the decentralization of power in France and the democratic transition in Spain, the Hungarian regime ordered the police to disperse the first stirrings of Eastern European rock music. Despite rough similarities in periodicity, these different timelines show us that festivals as an artistic form have been used as a political instrument in cultural policies by all political regimes. If we use the term "instrumentalization" here, it does not necessarily imply the negative aspects of governmental control or censorship. The fact that different waves of liberalization, revolution, and festival growth coincide shows us that instrumentalization can also be positive. It is the first way for festivals to be included in public policy agendas.

It is also true that festival policies vary from country to country, but they do show points of convergence. The particularities of these policies can be reduced to three main points. First, the different governmental levels are involved to varying degrees in the festival sector, a fact that is often linked to the size of a state or its constitutional system. Federal countries with strong regional traditions tend to give more power to the local and regional levels, as opposed to more centralized countries like France, Finland, or Hungary. Though the central government does have its own policies in these countries, it is the other governmental levels which determine festival policy. They define the criteria for financial support which privilege certain categories of events and encourage festivals to form associations. We can see this in Quebec, Spain, Belgium, and, to a lesser degree, in Italy. It is striking how similar the role played by the central government in Hungary is similar to that in the Belgian communities or by the provincial government in Quebec.

The second factor differentiating public policies is the intensity of their involvement in the festival sector. At the national level, we can oppose Norway, Hungary, and Belgium to Spain, Italy, and France. For the former group, governmental funding depends on very specific factors. Festivals must satisfy a wide array of criteria and are subject to evaluations that specifically determine which responsibilities will be granted to events in exchange for public funding or contracts. Even though these policies can be controversial, as is the case in Norway, or may be applied inconsistently, they do exist and provide a means for cultural operators to create a dialogue with public authorities. For the second group of countries, public funding policies, especially by the central government, remain vague and unpredictable, and are often the result of a conjuncture of political and social issues rather than an expression of the abstract principles guiding governmental intervention. In this respect,

Sara Tannå shows the relative invisibility of festivals within Swedish cultural policy. Moreover, legal frameworks and political discourses can sometimes evolve without producing any concrete changes in the festival sector. The French political discourse of the past twenty years provides us with a good example of this. At first openly in favor of public funding, it then adopted a very Malthusian approach, followed by a new appreciation of the artistic and cultural contributions made by festivals. Aurélien Djakouane and Emmanuel Négrier have shown how public funding has continued to decline over the same period, both in terms of the number of events receiving subsidies and the level of financing made available to them. Changes in rhetoric do not appear to have had a significant impact on how this aid is disbursed.

The third factor differentiating public policies is linked to how festivals are positioned within the array of publicly sponsored cultural offerings, regardless of the governmental level involved. Hungary provides us with the best illustration of this. In his monograph, János Zoltán Szabó demonstrates that there are areas where there is no real cultural policy, and festivals are the only operators offering access to cultural events. This is why policies within each country can vary. Some territories are already well endowed with cultural venues, while other territories are lacking in these – in particular, the northern regions in Scandinavia and rural areas in France, Quebec, and Spain. Naturally, there are two ways to interpret how festivals intersect with their territories. The first, more positive interpretation is for festivals to function as a tool for developing cultural activities within a territory lacking cultural venues or a regular cultural season, providing a way to reach audiences that otherwise would not have the possibility of attending these events. There is, however, a much less optimistic interpretation, according to which some local authorities push for the creation of festivals in order to avoid investing in real cultural policies. After all, a cynic would prefer the intermittent character of a festival to a direct investment in a year-long cultural activity since the latter represents a demanding involvement, high expenses, and sometimes less political visibility. In the first case, a festival fulfills a cultural mission of primary importance for areas with virtually no other alternatives. In the second, a festival provides a stop-gap measure to temporarily hide the lack of cultural activities.

With respect to these different cultural policies, it is clear that festival strategies are influenced by the presence or absence of cultural institutions or other cultural or socio-cultural operators. Without referring to competition between festivals taking place at the same time and within the same region, we can note that these events adapt to their territories by working with regional operators to develop their cultural projects. When a festival is the only event within its territory, it tends to privilege external cooperation (outside of its musical genre or its territory). When they must reckon with permanent

cultural venues, their interactions become more subtly balanced between cooperation and competition. The picture of an event as being "unattached" to its territory, with a team that packs its bags and leaves no trace of the festival behind it, is becoming more and more outdated, as we have already seen.

These differences in festival policy do not prevent us from emphasizing the points of convergence which seem to us to be more fundamental than the differences and, indeed, more substantial than we had initially expected. We will be examining three of these areas of convergence.

The first is the fact that the central government, its Ministry of Culture, and its specialized organs (for example, the different Arts Councils in Scandinavia, Ireland, and the United Kingdom) only play a marginal role in subsidizing festivals. We can suppose that the modest levels of public funding they provide to festivals are compensated for by the aura of legitimacy they impart to these events. This is partly true since, with the exception of European funds, these subsidies are becoming more and more selective and are disbursed to a relatively small number of festivals on the basis of their artistic quality and influence. However, though the rarity of these subsidies makes them precious, they also have less of an impact on the future of festivals.

The second point of convergence is related to the first in that local and regional authorities have taken on more importance. This is not just true of federalized countries with strong regional identities like Quebec, Belgium, or Spain. It can also be seen in a variety of very different political contexts – in France, Italy, and Norway, for instance. Though the objectives pursued by territorial authorities are often justified for reasons extrinsic to culture (strengthening the image of a municipality, political legitimization, social or economic development via cultural activities), we would be wrong to limit them to this dimension. Territorial cultural policies regarding festivals are often based on financial aid criteria, evaluations, and other forms of support that go far beyond the vague measures set into place by ministries.

The third area of convergence is the relatively modest amount of support granted to festivals by all governmental levels when compared to the public funding of cultural venues and institutions. The figures we have read in most of the preceding chapters show that, even when festival funding is emphasized, it is far from reaching 10% of the total cultural budget, regardless of the governmental level involved. Festivalization as a growing phenomenon is reflected in political discourse, some governmental practices, and certain policy measures, but there has been no paradigm shift nor a change in the policy tools of the cultural sector. Nevertheless, we can also see that "festival fever" has infected cultural venues, which attempt to take full advantage

of it. In parallel to the government support of these institutions – a classic tool for state intervention – there is equally the emerging philosophy of project-based funding, characterized by intermittent aid, competition, and risk for the operator. This growing practice has been found in many countries and regions, and in the end, it has had consequences for the cultural landscape, whether event-based or institutional. Among other consequences, one can see that cultural venues have been weakened by this approach and are turning to short-term sources of profit, that artistic risk is being minimized, and that the formal qualities of a project are being emphasized to the detriment of their content. In the end, changes in the festival sector are largely influenced by cultural policy as a whole, which leads us to the following paradox: festival activity is strongly influenced by the different political configurations of each country (Part 2 of this work), but the variable of festival nationality has only a limited influence on our data (Part 1). However, if we see this paradox as the first part of a syllogism, we are forced to reach the conclusion that, globally, festival policies show a high degree of similarity. After reexamining how public aid is distributed, the objectives that are pursued, and the differences between governmental levels and between musical genres, we find this conclusion to be convincing.

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To bring this study to its final conclusion, we will now turn to what the future has in store for festivals, both as a field of scientific study and as a more practical consideration of the trends that will affect tomorrow's festival landscape. We have identified three such fields of inquiry.

The first of these is economic in nature. We have noticed three trends within the festival field: first, smaller festivals are becoming increasingly vulnerable when compared to their larger counterparts; second, new tensions are beginning to appear with private partners (benefactors and sponsors); and third, it is becoming more difficult to satisfy the different demands placed on these private-public enterprises (profitability, attracting new and larger audiences, sensitivity to new artistic and cultural trends). The hybrid model characterizing festivals requires a great deal of resourcefulness to meet these demands – depending on the event, of course – and to achieve a certain balance. However, the poise which festivals have been able achieve is being threatened by recent developments. With respect to political institutions, there is the problem of the scarcity of public money, affecting both smaller events that rely more heavily on subsidies and the autonomy of festival organizations, since there are now more strings attached to these subsidies. Regarding sponsors, we can also observe trends constraining autonomy, since festivals are less able to take

advantage of brand recognition without being subject to pressure from their financial partners. The anecdote of the Hungarian festival that measures its audience size by the amount of beer sold is symbolic of a new balance which benefits sponsors while sacrificing the long-term identity of festivals on the altar of immediate economic returns and brand-name presence.

One way of facing these issues is through the inter-festival cooperation, a growing trend, as we have already observed. In the current context dominated by medium-sized enterprises, we notice that they are increasingly embedded in the regional territory from which they derive both their audiences and their funding. Given this, resource sharing seems to be more and more justified. Pushed to its extreme, this trend could lead to converting festivals into subsidiaries or the creation of brand-name events which can be easily duplicated. For the moment, this possibility is too far removed from the current situation to represent a threat to festival diversity, though there are a few notable examples: the *Sonar*, the *Primavera Sound System*, the *Folle Journée*, or the *Francofolies*, to limit ourselves to just French or Spanish cases. Without going to such extremes in our rhetoric, we can nevertheless see that inter-festival cooperation introduces a collective dimension, allowing festivals to share knowledge-based tools or strategies to deal with the demands of new partners, not all of which are unjustified. In terms of future research, it will be necessary to track trends toward collective action and sharing within the festival sector.

The second field of inquiry concerns the how different government levels intersect with festivals. This logically follows from our comparison of festivals and public policy as well as from the questions we have raised about regulating certain dynamics in the festival sector. One of the characteristics of the festival economy is that it is more able to attract private funding from multiple sources than is the case for other artistic institutions. When we retrace the historical development of cultural policies affecting festivals, our data shows us that central governments have assumed fewer responsibilities, concentrating more on older events dedicated to classical music with stronger national or international artistic reputations. The regional, provincial, or communal levels are on the front lines when it comes to addressing changes in this sector in terms of regional image, cultural policy, and economic development. Local authorities are in yet another situation. They are often in charge of managing basic artistic and cultural institutions and must contend with balancing the stress of constant activity with the need to develop larger cultural strategies in the events sector. In this network, the European Union – where the cultural budget is barely enough to cover the maintenance costs for a 10 kilometer stretch of highway – has a very marginal presence and its funding appears to be very unpredictable. Nevertheless, it does have an indirect impact through regulations. We can see this in the effect it has had on the relationship between local

governments and festivals through new rules addressing services of general economic interest. The way these different levels of government intervene varies from country to country.

It is not necessary to attempt to structure these complex relationships because they are affected by a number of factors: the powers delegated by national constitutions, political interplay, and specific cultural characteristics which are not particularly amenable to reform. However, it would be interesting to study in more detail three conclusions we have reached through our comparative study: a) European festival policies have a great deal in common, b) the similarities between events is more linked to aesthetic proximity than to shared nationality, and c) cooperative action is undertaken both by festivals and by festival associations. These lead us to two different directions in our research: the debate over European measures supporting continental collaborative projects and the comparison between our work on music festivals and what can be found in other performance arts such as theatre or dance.

Music festivals, as public-private enterprises, are situated within a changing world. On the one hand, there is a Darwinian element of the survival of the "fittest", which in the cultural sector does not necessarily mean the most interesting events. On the other hand, there is the question of cooperation, which often appears to be counterintuitive to festival directors. Between these two poles, we can expect to see much debate over the festival policies adopted by public authorities.

The third field of inquiry is linked to festivalization as a social phenomenon and how it influences the cultural sector. First, audiences 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. At the same time, we have observed that many festivals have developed long-term activities and projects that resemble the cultural offerings of these regular seasons. This has blurred distinctions in the cultural sector, which now contains events that are no longer festivals in the strict sense (a single place, concept, and timeframe) nor are they permanent institutions. The result is a widespread festivalization which, paradoxically, threatens Richard Wagner's classic definition of the festival, cited by Luca Dal Pozzolo and Luisella Carnelli: "an extraordinary event, in an extraordinary place, at an extraordinary time." For cultural operators and researchers, the crux of the question is how the festival sector can maintain its unique contribution to culture despite the intensive propagation of events due to festivalization.

Trondheim Jazzfestival



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Appendix

Country	Nº national	Name	StyleMusic
Bulgaria	205	March Music Days International Festival	Classical
Denmark	201	The Spot Festival	Rock-Pop
Spain	1	Let's Festival	Rock-Pop
Spain	2	San Miguel Primavera Sound	Rock-Pop
Spain	3	Encontre Internacional de Compositors	Classical
Spain	4	Festival de Guitarra de Barcelona	Rock-Pop
Spain	5	Semana de Música religiosa de Avilés	Classical
Spain	6	Lebrancho Rock	Rock-Pop
Spain	7	Festival de Blues de Barcelona	Jazz-Blues
Spain	8	Festival de Música Antigua de Málaga	Classical
Spain	9	Festival Internacional de Getxo	Jazz-Blues
Spain	10	Festival de Música Isaac Albeniz	Classical
Spain	11	Festival Internacional de la Sierra	World-Trad
Spain	12	Festival Internacional de Música Coral	Classical
Spain	13	Festival Internacional De Plectro de La Rioja	Classical
Spain	14	Festival Paparandafolk	Rock-Pop
Spain	15	Musicoral	MultiStyle
Spain	16	Fim – Festival de Música al Carrer de Vic	Rock-Pop
Spain	17	Temporada de Música de Cambra	Classical
Spain	18	Nowa Reggae	Rock-Pop
Spain	19	Festival Castell de Peralada	MultiStyle
Spain	20	Festival Internacional de Música de Cantonigròs	World-Trad

Spain	21	Festival dde Música Antigua de Úbeda y Baeza	Classical
Spain	22	Festival Internacional de Santander	Classical
Spain	23	Festival de Segovia	Classical
Spain	24	Festival Internacional de Música y Danza de Úbeda	Classical
Spain	25	Festival Internacional de Órgano Catedral de León	Classical
Spain	26	Festival Internacional de Música de Ourense	Classical
Spain	27	Festival Internacional de Música y Danza de Granada	Classical
Spain	28	Festival Internacional de Música « Concerts de Mitjanit » de Sitges	Classical
Spain	29	Cultura Quente	Rock-Pop
Spain	30	Els Grans del Gospel	World-Trad
Spain	31	Festival de Guitarra de Girona	MultiStyle
Spain	32	Festival Ribagorza "Clásicos en la Frontera	Classical
Spain	33	Festival L'hora del Jazz	Jazz-Blues
Spain	34	Muestra Internacional de Música de Plectro de Valladolid	Classical
Spain	35	De Cajón! Festival de Flamenco de Barcelona	World-Trad
Spain	36	Festival de Música antigua de Gijón	Classical
Spain	37	Festival Internacional de Música de Cambrils	MultiStyle
Spain	38	Flamenco Ciutat Vella	World-Trad
Spain	39	Poparb	Rock-Pop
Spain	40	Mostra Sonora de Sueca	Classical
Spain	41	Festival Internacional de Guitarra José Tomás	Classical
Spain	42	Musikaste	Classical
Spain	43	Semana de Música de Asturias	Classical
Spain	44	Festival de Música de Llivia	Classical
Spain	45	Sons de la Meira	Rock-Pop
Spain	46	Festival Internacional de Jazz de Barcelona	Jazz-Blues
Spain	47	Trobada de Acordeonistes del Pirineu	World-Trad
Spain	48	Bilbao Bbk Live	Rock-Pop
Spain	49	(A) Phonica	Rock-Pop
Spain	50	Black Music Festival	Jazz-Blues
Spain	51	Castañazo Rock	Rock-Pop
Spain	52	Cicle de Joves Interprets	Classical
Spain	53	Contempopranea	Rock-Pop
Spain	54	Cultura Pop	Rock-Pop
Spain	55	Eivissa Jazz	Jazz-Blues
Spain	56	Encuentro Coral San Juan	Classical
Spain	57	Euskal Herria Sona !	Rock-Pop
Spain	58	Femás – Festival de Música Antigua de Sevilla	Classical
Spain	59	Festival Internacional Castillo de Ainsa-Sobrarbe	Rock-Pop
Spain	60	Festival Internacional Chopin de Valldemosa	Classical

Spain	61	Cruïlla Barcelona	Rock-Pop
Spain	62	Festival de Música Antiga de Barcelona	Classical
Spain	63	Festival de Música de Canarias	Classical
Spain	64	Festival de Música Española de León	Classical
Spain	65	Festival Internacional do Mundo Celta de Ortigueira	World-Trad
Spain	66	Festival de Pollença	Classical
Spain	67	Festival de Verano de San Lorenzo del Escorial	Classical
Spain	68	Festival de Zarzuela de Canarias	Classical
Spain	69	Festival Faraday	Rock-Pop
Spain	70	Festival Internacional de Música Pau Casals	Classical
Spain	71	Jazz Voyeur Festival de Mallorca	Jazz-Blues
Spain	72	Banc Sabadell 13 Festival Mil·Leni	Rock-Pop
Spain	73	Teror Trumpet Festival	MultiStyle
Spain	74	Festour	Rock-Pop
Spain	75	Festival Internacional de Folklore Baza	World-Trad
Spain	76	Gospel Canarias Festival	World-Trad
Spain	77	Jazz a l'Auditori	Jazz-Blues
Spain	78	Lem: Experimental Music Meeting	Rock-Pop
Spain	79	Mercat Musica Vic	Rock-Pop
Spain	80	Mud – Musiques Disperses	World-Trad
Spain	81	Festival Paupaterres	World-Trad
Spain	82	Festival Internacional de las Culturas	World-Trad
Spain	83	Poborina Folk	World-Trad
Spain	84	Quincena Musical de San Sebastián	Classical
Spain	85	Invictro	Rock-Pop
Spain	86	Pirineos Classic	Classical
Spain	87	Cartagena Jazz Festival	Jazz-Blues
Spain	88	Festival de Mao	Classical
Spain	89	Festival Internacional Noches Mágicas de la Granja	Classical
Spain	90	La Mar de Músicas	World-Trad
Spain	91	Polifonik Sound	Rock-Pop
Spain	92	Rototom Sunsplash – European Reagge Festival	Rock-Pop
Spain	93	Esperanzah (Spain)	World-Trad
Spain	94	Festival de Arenys de Mar	Jazz-Blues
Spain	95	Schubertíada a Vilabertran	Classical
Spain	96	Festinoval	Jazz-Blues
Spain	97	Cantate Barcelona	MultiStyle
Spain	101	For Noise Festival	Rock-Pop
Spain	102	Musikfestival Bern	World-Trad
Spain	103	Culturescapes	World-Trad
Spain	104	Les Nuits du Monde	World-Trad

Spain	105	Internationales Musikfestival Alpentöne	MultiStyle
Spain	106	European Festival of youth choirs of Basel	Classical
Spain	107	Stanser Musiktage	World-Trad
Finland	1	Helsinki Festival	MultiStyle
Finland	2	Suvisoitto	Classical
Finland	3	Kuhmon Kamarimusiikki	Classical
Finland	4	Meidan festivaali	Classical
Finland	5	Turun musiikkijuhlat	Classical
Finland	6	Korsholm Music Festival	Classical
Finland	7	Naantalin musiikkijuhlat	Classical
Finland	8	Savonlinnan oopperajuhlat	Classical
Finland	9	Flow Festival	Rock-Pop
Finland	10	Musiikin aika	Classical
Finland	11	Ilmajoen musiikkijuhlat	Classical
Finland	12	Pori Jazz Festival	Jazz-Blues
Finland	13	Provinssirock	Rock-Pop
Finland	14	SataHame Soi	Rock-Pop
Finland	15	Ilosaarirock	Rock-Pop
Finland	16	Seinajoen Tangomarkkinat	Rock-Pop
Finland	17	Tuska Open Air Metal Festival	Rock-Pop
Finland	18	Luosto Classic	Classical
Finland	19	Vantaan musiikkijuhlat	Classical
Finland	20	Tampere Jazz Happening	Jazz-Blues
Flandre	1	Gentse Feesten	Jazz-Blues
Flandre	2	Rock Herk	Rock-Pop
Flandre	3	Mafestival Brugge	Classical
Flandre	4	Festival van Vlaanderen Vlaams-Brabant	Classical
Flandre	5	Reggae Geel	World-Trad
Flandre	6	Cactus festival	Rock-Pop
Flandre	7	Polé Polé Gentse Feesten	World-Trad
Flandre	8	Polé Polé Beach	World-Trad
Flandre	9	Genk on stage	Rock-Pop
Flandre	10	Sfinks Mixed	World-Trad
Flandre	11	Festival Dranouter	World-Trad
Flandre	12	Gent Festival van Vlaanderen	Classical
Flandre	13	Crammerock	Rock-Pop
Flandre	14	KlaraFestival	Classical
Flandre	15	Mechelen hoort Stemmen	Classical
Flandre	16	Festival van Vlaanderen-Mechelen/Kempen	Classical
Flandre	17	Festival van Vlaanderen Kortrijk	Classical
Flandre	18	Gent Jazz Festival	Jazz-Blues

France	1	Festival international d'Art Lyrique d'Aix-en-Provence	Classical
France	2	Festival d'Ambronay	Classical
France	3	Festival d'art sacré d'Antibes	Classical
France	5	Festival D'Auvers sur Oise	Classical
France	6	Festival Berlioz	Classical
France	7	Festival international de musique de Besançon	Classical
France	8	Festival de la Chaise Dieu	Classical
France	9	Festival Jean de la Fontaine	Classical
France	10	Les Nuits de Fourvière	Rock-Pop
France	11	Festival d'Ile-de-France	MultiStyle
France	12	Festival international de quatuors à cordes du Luberon	Classical
France	13	Printemps des arts de Nantes	Classical
France	14	Les Traversees Rencontres musicales de Noirlac	Classical
France	15	Les Chorégies d'Orange	Classical
France	16	Sinfonia en Périgord	Classical
France	17	Festival du Périgord Noir	Classical
France	18	Les flâneries musicales de Reims	Classical
France	19	Saison musicale de Royaumont	Classical
France	20	Festival de Saintes	Classical
France	21	Saoû chante Mozart	Classical
France	22	Festival international de musiques sacrées de Sylvanès	Classical
France	23	Rencontres Musicales de Vézelay	Classical
France	24	Cordes en ballade	Classical
France	25	Festival de Clairvaux Ombres et Lumières	Classical
France	26	Festival Européen Jeunes Talents	Classical
France	27	Festival international Toulouse les Orgues	Classical
France	28	Nevers D'Jazz Festival	Jazz-Blues
France	29	Europa Jazz du Mans	Jazz-Blues
France	30	Jazz campus en Clunisois	Jazz-Blues
France	31	Les rendez-vous de l'Erdre	Jazz-Blues
France	32	Aux heures d'été	World-Trad
France	33	Jazzdor	Jazz-Blues
France	34	Festival Nuits d'hiver	Classical
France	35	Festival Manca	Classical
France	36	Les Détours de Babel	Classical
France	37	Africajarc	World-Trad
France	38	Festival Villes des Musiques du Monde	World-Trad
France	39	Panoramas	Rock-Pop
France	40	Festival Marsatac	Rock-Pop
France	41	Festival Jardin du Michel	Rock-Pop

France	42	Les Eurockéennes de Belfort	Rock-Pop
France	43	La route du Rock	Rock-Pop
France	44	Les 3 Eléphants	Rock-Pop
France	45	Rockmotives	Rock-Pop
France	46	Art Rock	Rock-Pop
France	47	Garorock	Rock-Pop
France	48	Jazz in Marciac	Jazz-Blues
France	49	Tourcoing Jazz Festival	Jazz-Blues
France	50	Festival des Malins-Plaisirs	Classical
France	51	Voix d'été en Creuse	Classical
France	52	Festival de la Vézère	Classical
France	53	Les Nuits de nacre	World-Trad
France	55	Festival du Haut-Limousin	Classical
France	58	Festival 1001 Notes	Classical
France	59	Le festival aux Champs	Rock-Pop
France	60	Les Veyracomusies	World-Trad
France	61	Festival Mille Sources & Dordogne	Classical
France	62	Destination Ailleurs	World-Trad
France	63	Festival d'automne en Creuse de Jazz à la Sout	Jazz-Blues
France	64	Aujourd'hui Musiques	Classical
France	65	Chansons de parole	Rock-Pop
France	66	Détours du monde	World-Trad
France	67	Fiesta Sète	World-Trad
France	68	Les Internationales de la Guitare	World-Trad
France	69	Jazz à Junas	Jazz-Blues
France	70	Jazz à Sète	Jazz-Blues
France	71	Festival Jazzèbre	Jazz-Blues
France	72	Festival du Vigan	Classical
France	73	Festival Pablo Casals de Prades	Classical
France	74	Festival de Radio France et Montpellier	Classical
France	75	Festival de Thau	World-Trad
France	76	Les Transes Cévenoles	Rock-Pop
France	77	les Voix de la Méditerranée	World-Trad
France	78	Les Déferlantes d'Argelès-sur-Mer	Rock-Pop
France	79	Festival de Nîmes	Rock-Pop
France	80	Festival de Carcassonne	MultiStyle
France	81	Jazz sous les Pommiers	Jazz-Blues
France	82	Heures musicales de l'Abbaye de Lessay	Classical
France	83	Les promenades musicales du Pays d'Auge	Classical
France	84	Les Enchanteurs. Chansons en Pas-de-Calais	Rock-Pop
France	86	Polyfollia	World-Trad
France	87	Septembre Musical de l'Orne	MultiStyle

France	88	Artsonic	Rock-Pop
France	89	Les Suds Arles	World-Trad
France	90	Fiesta des Suds	World-Trad
France	91	Babel Med Music	World-Trad
France	92	Joutes musicales de Correns	World-Trad
France	93	Festival Nuits du Sud	World-Trad
France	851	Varembert Music Festival	World-Trad
France	852	Minifest	World-Trad
France	941	Festival au Fil des voix Vaison-la-Romaine	World-Trad
France	942	Festival au Fil des voix Paris	World-Trad
Ireland	1	Cork Jazz Festival	Jazz-Blues
Ireland	2	West Cork Chamber Music Festival	Classical
Ireland	3	Kilkenny Arts Festival	MultiStyle
Ireland	4	Sligo Live	Rock-Pop
Ireland	5	Pan Celtic International Festival	World-Trad
Ireland	6	Cork International Choral Festival	Classical
Ireland	7	Killarney Summerfest	Rock-Pop
Ireland	8	St Patrick's Festival	World-Trad
Ireland	9	Earagail Arts Festival	World-Trad
Ireland	10	Eigse Carlow Arts Festival	World-Trad
Ireland	11	Kinsale Arts Festival	MultiStyle
Ireland	12	Spraoi International Street Arts Festiva	Rock-Pop
Ireland	13	Cork Midsummer Festival	MultiStyle
Ireland	14	Dublin Fringe Festival	Rock-Pop
Ireland	15	Boyle Arts Festival	MultiStyle
Ireland	16	Fleadh Cheoil Na hÉireann	World-Trad
Ireland	17	Mayo International Choral Festival	Classical
Ireland	18	Willie Clancy Festival	World-Trad
Ireland	19	Sea Sessions	Rock-Pop
Ireland	20	Ennis Street Festival	Rock-Pop
Ireland	21	The Clancy Brothers Music and Arts Festival	World-Trad
Islande	203	Reykjavik Arts festival	World-Trad
Lithuania	206	Vilnius Festival	Classical
Luxembourg	1	Festival International Echternach	MultiStyle
Norway	1	Trondheim Jazzfestival	Jazz-Blues
Norway	2	DolaJazz Lillehammer Jazzfestival	Jazz-Blues
Norway	3	Vinterfestspill i Bergstaden	Classical
Norway	4	Forde Internasjonale Folkmusikkfestival	World-Trad
Norway	5	Vestfoldfestspillene	Classical
Norway	6	Kammermusikkfestivalen i Stavanger	Classical
Norway	7	Olavsfestdagene	Classical
Norway	8	Festspillene i Nord Norge	Classical

Norway	9	Kongsberg Jazzfestival	Jazz-Blues
Norway	10	Vossa Jazz	Jazz-Blues
Poland	204	Ludwig Van Beethoven Easter Festival	Classical
Portugal	98	Festival do Estoril	Classical
Quebec	1	Festival des guitares du monde en Abitibi	MultiStyle
Quebec	2	Festival du monde arabe de Montréal	World-Trad
Quebec	3	Festival International des musiques sacrées de Québec	Classical
Quebec	4	Carrefour mondial de l'Accordéon	World-Trad
Quebec	5	Coup de cœur francophone	Rock-Pop
Quebec	6	Festival Country	Rock-Pop
Quebec	7	Festival off de Québec	Rock-Pop
Quebec	8	Festival d'été de Québec	Rock-Pop
Quebec	9	Concerts aux Îles du Bic	Classical
Quebec	10	Festi Jazz International de Rimouski	Jazz-Blues
Quebec	11	Festival de musique émergente en Abitibi	Rock-Pop
Quebec	12	L'OFF Festival de jazz	Jazz-Blues
Quebec	13	Montréal Electronique Groove	Rock-Pop
Quebec	14	Jonquière en Musique	Rock-Pop
Quebec	15	Montréal/Nouvelles Musiques	Classical
Quebec	16	POP Montréal	Rock-Pop
Quebec	17	Festival de Jazz de Québec	Jazz-Blues
Quebec	18	Festival des journées d'Afrique	World-Trad
Quebec	19	Festival Promotuel de la relève	Rock-Pop
Quebec	20	Festival des harmonies et orchestres symphoniques du Québec	MultiStyle
Quebec	21	Maximum Blues	Jazz-Blues
Quebec	22	Festival international de Lanaudière	Classical
Quebec	23	Festival Mémoire et Racines	World-Trad
Quebec	24	F.I.P. Festival International de Percussions	World-Trad
Quebec	25	La Grande Rencontre et Conférence Trad Montréal	World-Trad
Quebec	26	Festival de Trois-Rivières en Blues	Jazz-Blues
Quebec	27	Festival Jazz Etcetera Lévis	Jazz-Blues
Quebec	28	Osheaga festival musique et arts	Rock-Pop
Quebec	29	M pour Montréal	Rock-Pop
Quebec	30	Festival en chanson de Petite-Vallée	Rock-Pop
Quebec	31	Festival Suoni per il Popolo	Rock-Pop
Quebec	32	Festival International de Jazz de Montréal	Jazz-Blues
Quebec	33	Les FrancoFolies de Montréal	Rock-Pop
Quebec	34	Le Festival international du Domaine Forget	Classical
Quebec	35	Festival de la chanson de Tadoussac	Rock-Pop
Quebec	36	Festival international Nuits d'Afrique	World-Trad

Quebec	37	Mondial Loto-Québec de Laval	MultiStyle
Quebec	38	Festival international du Blues de Tremblant	Jazz-Blues
Quebec	39	La Fête de la Musique	Classical
Quebec	40	Les Rythmes Tremblant	Rock-Pop
Quebec	41	Sacré-blues Molson Ex	Jazz-Blues
Quebec	42	Festival de Blues de Victoriaville	Jazz-Blues
Quebec	43	Festival Montréal Baroque	Classical
Sweden	1	Kammarmusikfestival Stenungsund	Classical
Sweden	2	Musik pa Sormlandska slott	Classical
Sweden	3	Stockholm Early Music Festival	Classical
Sweden	4	Festspelen i Pitea	Classical
Sweden	5	Kalvfestivalen	Classical
Sweden	6	Bangen Jazz Blues	Jazz-Blues
Sweden	7	Ostersjofestivalen	Classical
Sweden	8	Umea Jazzfestival	Jazz-Blues
Sweden	9	Vinterfest	Classical
Sweden	10	Lycka Kammarmusik Festival	Classical
Sweden	11	Emmabodafestivalen	Rock-Pop
Sweden	12	Saxa Kammarmusikfestival	Classical
Sweden	13	Umefolk	World-Trad
Sweden	14	Musik i Kullabygden	Classical
Sweden	15	Urkult Folkfest vid Namforsen	World-Trad
Sweden	16	Norbergfestival	Rock-Pop
Sweden	17	Sweden Rock Festival	Rock-Pop
Sweden	18	Ransaterstamman	World-Trad
Sweden	19	Kalottjazz Blues Festival	Jazz-Blues
Sweden	20	ostergotlands musikdagar	Classical
Sweden	21	Vadstena Akademien	Classical
Sweden	22	Lacko Slott Operan	Classical
Sweden	23	Made	Classical
Wallonie-Bruxelles	1	Festival de Stavelot	Classical
Wallonie-Bruxelles	2	1 chanson peut en cacher une autre…	Rock-Pop
Wallonie-Bruxelles	3	Festival musical de Namur	Classical
Wallonie-Bruxelles	4	Midis-Minimes	Classical
Wallonie-Bruxelles	5	Jazz à Liège	Jazz-Blues
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Wallonie-Bruxelles	12	Fiesta City	Rock-Pop

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Wallonie-Bruxelles	23	Maisha	World-Trad
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Wallonie-Bruxelles	25	Durbuy Rock Festival	Rock-Pop
Wallonie-Bruxelles	26	Spa Tribute Festival	Rock-Pop
Wallonie-Bruxelles	27	Brussels Jazz Marathon	Jazz-Blues
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Wallonie-Bruxelles	32	Donkey Rock Festival	Rock-Pop
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