

International Journal of Music Business Research

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The festivalization of live music: Introduction

*Erik Hitters & Carsten Winter*¹

Live music has moved center stage in the contemporary music industries. While the music business in general has been severely hit in the last decades by the effects of digitalization, resulting in the plummeting revenues from recorded music, recovery has set in slowly but gradually since the turn of the century. This recovery came from two developments. The first was the newly found profitability of digital sales and streaming of recordings, which has taken some time to develop into a viable business model. The second came from another segment of the music industries: live music. According to Naveed et al (2017) the revenues from live performances account for the majority of the overall revenues of the music industries between 2010 and 2015 (Naveed, Watanabe & Neittaanmaki 2017). Consultancy firm Ernst & Young (EY 2014) likewise showed in 2012 that across the EU, half the revenues of the music industries was from live music. While we are certainly not the first to signal this trend (Frith 2007; Holt 2010; Mortimer, Nosko & Sorensen 2012), it indicates how crucial live music performance has become for the business models of the music industries (Mazierska, Gillon & Rigg 2020; Williamson & Cloonan 2007).

It is critical to ask who has benefited from this development and how it affects the music business as an institution, but also the practices of musicians and bands. Recent research suggests that it is mainly the

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absolute top tiered artists who have been able to secure rising revenues from live music (Krueger 2019). For most artists playing live is part of their daily routine of being in the music business and while that has always been the main source of their livelihood (Rutten & Smeets 1997; Krueger 2019; IJdens, Von der Fuhr & De Rooij 2008) we can only presume that they have had to intensify their touring schedules in order to make up for possible losses from the sales of their recordings.

As recently argued by Mulder, Hitters & Rutten (2020), not only has the position of live music within the pop music industries changed over the last decades; the festival is becoming the primary form for the staging of live music. As Simon Frith (2007) argued, festivals have been used as a strategy by music promoters to increase their audiences as well as their revenues. In economic terms, festivals allow for economies of scale. While the first pop festivals date back to the 1960s, their commercial impact and growth accelerated in the last two decades (Webster 2014, Van Vliet 2019). Research from the Netherlands suggests that there is almost a 10% growth annually in the number of music festivals between 2014 and 2018. Most of the Dutch music festivals only existed for ten years or less (Van Vliet 2019).

While the importance of the music festival economy is often suggested (Holt 2010; Van der Hoeven & Hitters 2019; Webster et al. 2018) it is difficult to measure its economic performance. Much of its impact is indirect in that it generates revenue outside of the confinements of the event itself, which is notoriously difficult to measure and easily overestimated. In Australia the value of live music to the community was estimated at almost 10 billion US Dollar for 2014 (Whiting 2015); According to UK Music *"the UK's live music sector's contribution to the economy grew to a record high of £1.1 billion, which is a 10% overall rise on 2017"* (UK Music 2019). When looking at specific company performance, Live Nation reports continuous growth, both in attendance and revenue, while profits added to a whopping US \$98 million in 2019 (Live Nation 2020).

1 The festivalization of the music business

It is clear that the economic as well as the societal impact of live music is expanding. It is changing live music as an organizational field. During the last two decades competition for the traditional 'brick and mortar' venue has become stiff. No longer is the performance of live music confined to dedicated spaces, which have been purposely built and designed as a music venue. Increasingly, existing unused structures are modified to be used as music venues, such as churches and factories, while other large event locations like theatres and stadiums are also hosting concerts. And last but not least, temporary festivals are mushrooming, using spaces such as parks, squares, fields, empty factories and whole neighborhoods and villages (Kronenburg 2012). Live music and festivals are becoming an established element of our urban as well as rural fabric.

The concept of festivalization is widely used to refer to the effects of the expanding festival industry (Bennett, Taylor & Woodward 2014; Mulder, Hitters & Rutten 2020). In the 1990's, when new festivals were beginning to pop up all over the globe in advanced western economies, Haußermann & Siebel were among the first to use the concept of festivalization in their discussion of the increasing importance of cultural festivals in urban development and image politics. Interestingly, they tie this trend in with the mediatization of society. *"In order to maintain audible and visible in the cries of the mass media, urban politics is concentrating on temporal and spatial aspects: festivalization as media-oriented staging of the city"* (Haußermann & Siebel 1993: 15). For them, and likewise later on for Hitters (2007), Richards (2010) and Jakob (2013), festivals are considered a strategy within the scope of urban planning and policy making aimed at generating positive external effects for cities and regions.

However, festivalization has also increasingly been used in other contexts, mainly to describe the rapid growth in the number of festivals and the displacement effects on regular cultural programming. After a surge in serious European music festivals before the turn of the millennium (Frey 2000), the trend of festivalization spread quickly. Negrier (2014) is critical of what he labels as the 'eventalisation' of regular cul-

tural supply, and he argues that festivalization should be understood as an expression of larger societal developments. As much as the festival has become a growth strategy and a crowd puller, festival organizing has developed into a professional industry. Festivalization then, needs to be understood within the fast growing and changing live music industry.

We argue that festivalization is a phenomenon with broad implications. It needs to be considered beyond a purely instrumental understanding as being a mere growth strategy for the live music business. Also, its impact is more far reaching than just the effects of the numerical increase of events for communities and cities. Our aim is to push for a more sociological and institutional approach for this phenomenon. The festival, we argue, has not only become the new dominant configuration of the live music field, but is – with new digital structures, a new openness for activities in the space of (data) flows as well as with developing issues and partners – becoming a relevant co-organizer of the development of the overall music industry.

While most exclusive music festivals have been and still are cancelled in COVID-19 times, music festivals with showcase events and conferences are being developed further as hybrid festivals in the space of places and at the same time in the space of digital (data) flows (Castells 2010). Even at the time of the greatest crisis in the music industry, even more dramatic than the crisis of the (recorded) music industry (1998-2013), these festivals become even more important in their festive agency periods, in which the gaps between music business actors and other innovative actors of various fields are narrowed. They show that work on the future of music continues in the age of social distancing. With these hybrid festivals as co-organizers of the future of music, the music industry is even expanding its role as a laboratory for the future in the media, creative and cultural sectors.

This work on the future in the field of music currently applies in particular to the very advanced division of labor that has taken place in the music industry and especially the festival industry, which is becoming increasingly complex across the boundaries of industries and even the economy itself with its numerous part time workers and volunteers. We

are currently getting to know the downsides of this advanced division of labor and hopefully overcome them with examples of new organizational forms. Because we learn that the great flexibility, creativity and agility of the industry, which has contributed so much to our musical prosperity, only has a future if it meets an equally advanced social solidarity. The current creative, critical and political work on the development of solidarity structures for and with the increasingly small-scale networked players in the music industry opens a new chapter in the transformative digitization of economy, culture and society. Other actors and industries will later use these, when further developing their labor structures.

This special festivalization issue of the *International Journal of Music Business Research* presents three articles on the relation between festivals, live music ecologies, music business practices and local policies. With contributions from the USA, UK and The Netherlands, the issue offers a diverse international outlook on the challenges of the live music and festival industries.

In "Navigating troubled waters; how are music festivals affecting the local concert industry?", Jeff Apruzzese presents a close-up look into the practices of the music festival industry in the USA, by focusing on radius clauses, also known as exclusivity deals. A radius clause is part of a contract between an act and the festival stipulating that the act cannot perform for a specific period of time within a restricted radius around the festival location. Apruzzese draws up a compelling argument on how these clauses affect local venues and other organizers of live music, effectively obstructing their choice of bands to play for local audiences.

Erik Hitters & Marijn Mulder explore local policies on live music and festivals in their contribution "Live music ecologies and festivalization: the role of urban live music policies". In particular, their focus is on how such policies have been subject to festivalization. They present an analysis of urban live music policies and festival development, complemented by case studies of three cities in The Netherlands, which all show different approaches to the changing and developing field of live music and festivals. Such policies, they argue, are persistently instrumental in na-

ture while offering ample variation within local contexts, resulting in distinct outcomes for local live music ecologies.

A special contribution is from renowned live music researcher Martin Cloonan, who looks back at fifteen years of active involvement in live music research in the UK. In "Trying to have an impact: Some confessions of a live music researcher" he mindfully reflects on the paradoxes of his role as an academic observer and analyst and the need for informed and impactful interventions in the business and policies of live music. His argument revolves around the issue of commitment, collaboration and trust and suggests that impact can be realized by carefully building on established networks.

These contributions, we believe, are characteristic of the methodological scope and interdisciplinary diversity of the *International Journal of Music Business Research*. They present a fascinating variation in scientific approaches while all remaining relevant to the professional field of the music business. We would like to thank all the authors for their contributions, and we are convinced that this special issue can offer insights and understandings to everyone interested in the business of live music and festivals.

The IJMBR is aimed at all academics around the world, from students to professors, from all disciplines and with an interest in music business research. Interdisciplinary papers will be especially welcome if they address economic and business-related topics in the field of music. We look forward to receiving as many interesting papers as possible. Please send paper proposals to music.business.research@gmail.com.

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Navigating troubled waters; how are music festivals affecting the local concert industry?

Jeffrey Apruzzese²

Abstract

As more music festivals begin to develop every year, promoters look to protect their lineups by instituting radius clauses. These radius clauses prohibit artists from performing within a certain timeframe outside of the geographic location of the festival. As many of these festivals take place in major cities, what is the effect they are having on the local market? In my research, I use the Boston Calling Music festival to argue that radius clauses do not pose a threat to established concert promoters who are able to adapt amongst the competition, but rather smaller level artists are the ones who potentially could be negatively affected. As many of the agents and promoters are aware of the radius clause, they know that it is just one more thing for them to work around, and something that usually only places a temporary hold on booking a band. I support my argument with four semi structured interviews with a booking agent from Paradigm, a talent buyer from Boston Calling, and concert promoters from Live Nation and AEG.

Additionally, I use data from Pollstar to examine the change in ticket sales for two Boston Venues after the Boston Calling music festival was established in their territory.

Keywords: Music festivals, local concert industry, live music business, music promoters

1 Introduction

Ever since Woodstock, festivals have changed the way in which music is experienced. As Laing (2004) suggests Woodstock was the template for the commodification of the music festival. Additionally, Woodward, Taylor & Bennett (2014) maintain the event became the foundation for the

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look and feel of music festivals and much of the aesthetic understanding of the relationship between music, politics and identity that manifested itself at Woodstock is a vital part of all of today's current music festivals. While Woodstock was in part a festival that celebrated counterculture, festivals have now become something that is part of mainstream American culture, as well as a phenomenon that has dominated the music industry. According to Nielsen (2014) 32 million people go to at least one music festival every year. One of the contributing factors that so many music festivals have popped up is because there exists the potential for concert promoters to make such a large profit. As Krueger (2019) points out, festivals help spread out the cost that a promoter would have to pay for one show by allowing them to extend the cost of overhead such as production, lighting, and staffing across to multiple artists. Bosse (2015) points out that while streaming sites like Spotify and illegal downloads have deflated album sales, they have helped drive the re-emergence of the summer festivals. Furthermore, according to Krueger (2005), music festivals are often times cheaper for an attendee when you consider how many artists, they will see in comparison to how much the cost of a concert ticket has risen over the past 40 years. Frey (1994) also argues that another key factor leading to the rise of music festivals can be attributed to the increasing amount of disposable income available to spend on entertainment.

Coachella, a 3-day music festival that takes place over two consecutive weekends in Indio California with over 150 bands performing, is often cited as being one of the most profitable festivals in the world (Pollstar 2018). Coachella is part of a rapid build-up in stationary music festivals across the country, which is reflective of the growth of the live music scene since the millennium. As Parker (2013) reports album sales have dropped 50%, while concert sales have filled up 40% of that gap. In that same time period, live music revenues rose from \$1.5 billion to 4.6 billion. In 2015, the total revenue for live music and concerts was \$4.3 billion vs \$7 billion in total music revenues, with more than half being digital. As album sales have dropped, festivals have become one of the most profitable areas of the music business (Bain 2017).

With so much money potentially at stake for these giant music festivals, promoters look for ways in order to ensure their investment with the artists that they are booking. Bain (2017) notes that a common component of major festival contracts are radius clauses. The radius clause puts restrictions on how long the artist must wait before returning to the same market, and the distance from the festival they must go in order to play another show within that time frame. Some festivals are more extreme than others, saying artists are not even allowed to announce other performances until their festival is announced or even sold out. Tom Windish is quoted saying, "*festivals want to be as exclusive as possible*", which is why Coachella puts a limited time ban on artists performing in southern California (Walters 2012). Walters argues that as songs and albums become more freely available on the internet, bands rely on money from touring. In the traditional model of the music industry, artists would go on tour to support the release of their record, whereas now artists will make a record in order to support their tour.

2 Background

The concept of the radius clauses is not new. Knopper (2014) points out that since some of the major festivals like Lollapalooza stay on top of their radius clauses, agencies such as William Morris Endeavor have had to create an entirely new department devoted to making bands' deal with festivals and managing their touring routes. Gwee (2016) addressed the fact that the radius clause for Lollapalooza for example, prohibit artists from performing 300 miles around Chicago, 6 months before the festival and 3 months after. Limitations such as this can negatively impact smaller bands who are not getting paid as much and cannot afford to drive past the area designated by radius clause in order to perform. However, because of fear of not being booked by these festivals, many of the bands do not complain. These radius clauses are not set in stone, as much of the literature talks about how the language that is written in the contract is often negotiable. Often, the artist can reach a deal with the festival but the larger the artist, the more the festival is going to

want to protect them. The proximity and the size of the show that's within the radius, as well as the perceived effect that it will have on the show's bottom line, will ultimately determine if the radius clause can be broken or not.

There are numerous articles that discuss the potential effects of what major music festivals could have on local promoters and as Brennan & Webster (2011) mention, promoters matter to artists now more than ever, as changes in music revenue sources force musicians to think of live music (concert fees, merchandise, performing rights, and so on) rather than record sales as their primary source of income. As Simon Frith (2007) notes, the most significant means of expanding the size of the live audience for British promoters has 'undoubtedly' been festivals, which are now the 'key asset' in promoters' portfolios for obvious economic reasons including that the crowd size can be expanded beyond that of a venue, and the economies of scale can kick in to include ticketing, marketing, and staging (Webster & McKay 2016). As Brennan & Webster (2011) argue, the emergence of Live Nation as the largest promotional company in the world has challenged the common-sense definition of a concert promoter even further and is responsible for tours, festivals and other events, using both its own venues and others' if required. Similarly, Bain (2017) addresses the fact that the politics and usage of radius clauses have evolved with the consolidation of music festivals, as Live Nation and AEG have acquired so many of the small local promoters. She argues that these consolidations make it possible to offer artists multiple festivals over the course of the touring season and making it impossible for other promoters to book them. Enough local promoters voiced their opinion on this potential artist monopoly and Knopper (2010) writes about how in 2010 the attorney general's office investigated Lollapalooza on antitrust grounds. Furthermore, Hiller (2014) considers how local music venues are affected by exclusive contracts. He argues that music venues face two possible competition effects from the presence of these festivals. The first being that the presence of music festivals can diminish the ability of smaller firms that are affected by the festivals to attract enough popular band to fill their

schedule, which could lead to closure or deterring entry and second, that festivals create local demand for the bands and various genres of music involved, which could lead to a wider base of artists and genres that could be hired. Additionally, these types of limitations make it increasingly difficult for venue owners and promoters to maintain their longevity of building a history and relationship with an artist as Behr et al. (2016) mention that promoters invest in emerging artists who are back by booking agents, early in their careers in the hope that they will be high-earning acts in the future while, at the same time, arguably exploiting (by paying much lower fees to) local artists who lack such endorsements from booking agents. This then leads to many instances in which a concert promoter will work to grow a small artist, only to lose the play in the market to a festival.

As demand continues to grow, more and more festivals are launching every year, which in turn makes each of festival promoter want to protect their line-up with a radius clause. However, as Danton (2016) points out, we may have reached our peak festival season. He argues that music festivals no longer have distinct identities, and festivals that were once genre specific, now blur many, if not all of the genres together. Furthermore, he adds that we may have already seen signs of the tipping point as numerous long-standing festivals have been cancelled or gone on hiatus.

The objective of this paper is to explore the relationships between music festivals and local promoters and if music festivals are interfering with the traditional model and working relationship of concert promoters and booking agents. This paper adds to the academic work of live music and helps to answer, 'Do major music festivals with extensive radius clauses have negative effects on local promoters in major cities?' I work to determine whether concert promoters are affected by these radius clauses. Specifically, does the radius clause affect the ability of promoters to fill their concert schedule? I explore whether this clause may have a positive or negative effect, whether local venues are closing and if promoters are being put out of business, and what strategies or new practices are put into place in order to maintain a competitive edge

for both the local concert promoter and the festival promoter. I also consider the effects if the radius clause was removed entirely. I use data on two music venues combined with interviews from experts in the market to support my arguments.

3 Research Design

In this study, I examine a single festival in one market, but future research should work towards including the relationships between more festivals and more diverse markets. I examined the Boston Calling Music festival, which is a 3-day music festival that takes place in Boston Massachusetts during the last month of May, and what effect it had on two venues in the city, The Sinclair and House of Blues. The festival when first established had a daily attendance of 20,000 people and after several year moved to a larger venue and now has attendance of upwards of 40,000 per day. It is important to note, that when first established, Boston Calling was booked by Bowery Boston/AEG, who also owns the venue The Sinclair. I chose these two clubs for the study as they are the two most preeminent venues in the city. Furthermore, according to the last public report, the House of Blues in Boston, which is owned and operated by Live Nation, was named the 2nd most popular club in the US, with a yearly attendance of 322,755 (Billboard 2014). I use data from Pollstar, the music industry trade publication that focuses on the live music and concert sector, to see how many shows per year the two venues were doing before and after the Boston Calling music festival was established. In looking at Pollstar, not only was I able to see if the number of shows changed at these venues, but I was also able to see if they were able to book the same artists as the festival within the same year.

In the websites database, I was able to purchase box office history for both The Sinclair and House of Blues. As showing in figure 1, with each concert date that is reported it shows the name of the artist performing, the support act, the total number of tickets sold, the venue capacity, the percentage of tickets sold, the ticket price, and the total gross earned by the show.

Pollstar Venue Tour History Report

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House Of Blues Boston

Headline shows reported from Sunday, November 02, 2014 through Wednesday, October 18, 2017.

Date	Headline Artist/Band/Event Venue City, State/Country Promoter(s)	Supporting Act(s)	Tickets Sold Capacity Percentage Ticket Price	US\$ Gross Foreign Currency Gross
11/26/2014	Julian Casablancas + The Voidz House Of Blues Boston Boston, MA Crossroads Presents	The Voidz, Shabazz Palaces	762 2425 31% \$30.00-\$40.00	\$23,360.00
11/23/2014	50 Cent House Of Blues Boston Boston, MA Crossroads Presents	G-Unit	2425 2425 100% \$50.00-\$65.00	\$122,585.00
11/22/2014	B.o.B. House Of Blues Boston Boston, MA Crossroads Presents	Kevin Gates	1215 2425 50% \$22.00-\$39.50	\$35,432.50

Figure 1: Ticket sales report for House of Blues Boston (Source: Pollstar Venue Tour History Report (2007-2017))

Furthermore, Pollstar provides the overall gross for every show, allowing for yearly totals. There are several important questions that the data set allows me to answer. First, I look to see how many shows these venues were offering per year before and after the festival started. In addition to how many shows per year, I also look to see if they started offering more shows during months that the festival was not in town, such as the winter months, which is a less frequent tour season for bands. I then also look to see if either of these venues booked the same artists as the festival in the same year. Finally, I examine whether there were any changes from when Boston Calling went from two weekends to one weekend, and when they moved from a Government Center, to a larger facility in Allston. Boston Calling was held during the Spring and the Fall for 2014 and 2015, while beginning in 2016 it switched to one weekend. Additionally, in 2017, the festival moved from Government Center, which had a capacity of 20k people, to the Harvard Athletic Complex in Allston. One limitation I discovered in this data was how far back the information goes for each venue. Pollstar has information available for The Sinclair from 2012, which is before Boston Calling was established, and is in the timeframe I was looking to examine. The House of Blues however, only has information available from 2014, so my analysis is

more limited with this venue. There is still much to gain from analyzing the House of Blues as it consistently does a high volume of tickets every year, and is also a Live Nation run room. In addition to the data I collected from Pollstar, I also conducted several interviews. In my semi-structured interviews, I was able to gather data from two concert promoters (Live Nation and AEG respectively), referred to as promoter (a) and promoter (b), one festival booker and one agent from Paradigm.

4 Discussion of main findings

In looking at the Pollstar reports, there are only two years in which there are complete data sets for the House of Blues and Sinclair, where they overlap with one other. In figure 2 you can see the comparison of the average amount of tickets sold for both venues. Although we are only looking at two years, we can see that both venues follow very similar patterns. It is important to note that the capacity of the House of Blues is approximately 2400 people, while the Sinclair is only 500. Therefore, the spikes and dips are going to be much more pronounced in the former than the latter. In examining 2014 and 2015, we can see that both venues see a steady increase in ticket sales from January to March, and then slowly start to decline until hitting their lowest point at the end of July and beginning of August. Then in August we see start to see a steady increase with the highest spike happening in October. A relevant question for these festival clauses whether or not this drop off in the summer was caused by festivals in the local market, and if the radius clauses were blocking their calendars, or if there were other factors that were causing this decline.

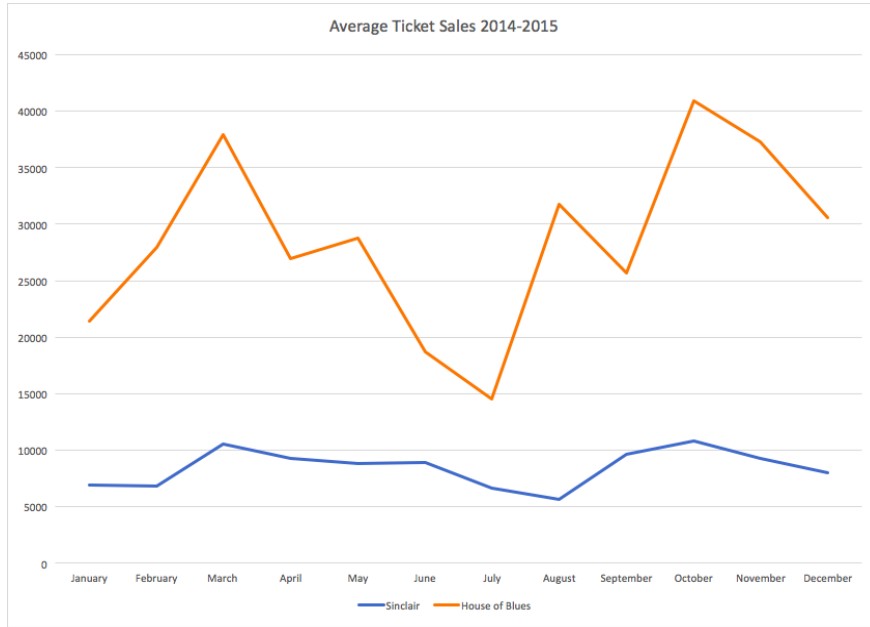


Figure 2: Average ticket sales for the House of Blues and Sinclair (Source: Pollstar Venue Tour History Report 2007-2017)

In talking with promoters and agents, they all shared a similar opinion. According to promoter (a), *"it's not unique to Boston. I think everywhere you see a decline in indoor club business in the summer, some of that is due to festivals, but if you have a 4th quarter album release, October is the best time to tour. You really have no big holidays to bump up against, it's a pretty free and clear month to tour in."* When I interviewed promoter (b) and asked him about why we see a drop off in ticket sales around Memorial Day, and then a build that spikes in October, he offered a very similar answer to promoter (a). *"It's been that way (lots of ticket sales in spring and fall and less in winter and summer) for at least 20 years so I don't think it has a ton to do with festivals though Boston with 250,000 college students may be an exception. In general, we are really busy in the fall and spring as that is when the population here is*

the fullest with all the students in town." Another more obvious reason contributing to the slowdown in indoor club business is the ramp up of shows at outdoor venues. Especially in places like the east coast of the United States, after horrible winters, concert goers want to be outdoors enjoying the weather at venues like Fenway, Gillette, Blue Hills Bank Pavilion, Xfinity Center, and Boston Calling, which leads to a natural slowdown in ticket sales for the indoor clubs that are frequented during colder months.

Clearly, both local promoters in the Boston music scene feel that this decline in ticket sales is something that existed before the festival was put into place and booking agents appear to feel the same way. The agent adds to this, *"100% because so many college kids leave. By October everyone has their flow figured out, and know what they can spend money on."* This leads me to believe then, that the radius clause being issued by Boston Calling is not a major factor that is causing a significant decrease in ticket sales over the summer, and that this is an issue that has existed in this territory long before the festival came into play. Both promoters in this study, along with the agent all argue that in such a large collegiate city like Boston, there are many other external factors that can lead to a decrease in ticket sales over the summer, with music festivals being just another threat.

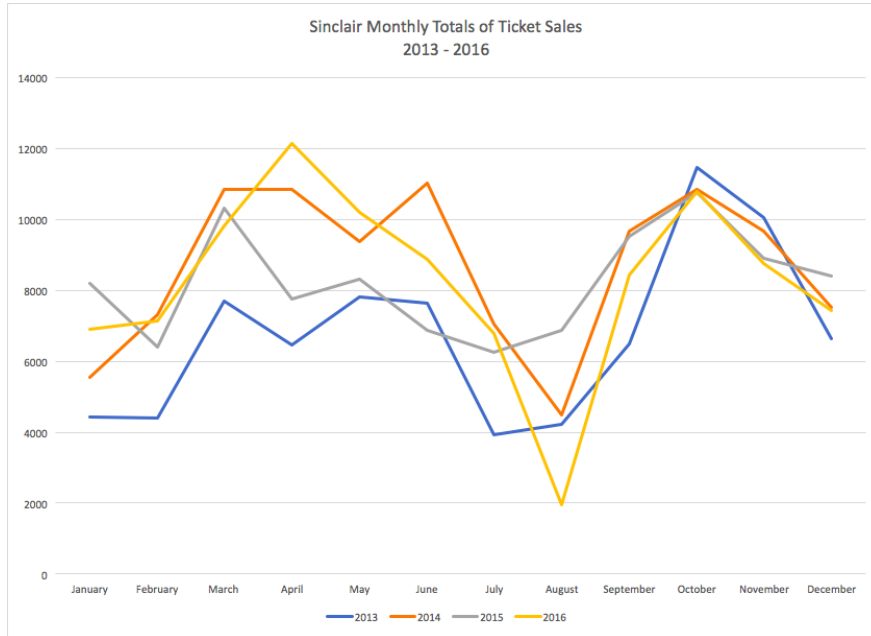


Figure 3: Sinclair monthly totals of ticket sales (Source: Pollstar Venue Tour History Report 2007-2017)

Figure 3 considers the total amount of tickets that the Sinclair was selling for each month from the years 2013 – 2016. From 2013-2015 the festival was booked by Bowery Presents, and in 2016 they brought in their own internal buyer to take over booking the festival. Because of this early arrangement, Bowery had complete control over what acts they were booking for the festival, and what acts that they might want to bring to a club show. It was my initial assumption that in 2015 when they stopped booking the festival there would be a dip in ticket sales. However, that is not necessarily what the graphs shows. Even though we see a slightly smaller amount of ticket sales in the beginning of the month, we actually see a much smaller drop off in the summer, as compared to 2013, and 2014. Whereas in 2016, we see the largest overall spike with the biggest drop off in the summer. In assessing their overall

sales for each year, we see a very insignificant drop from 2014 to 2015, and then a slight increase going into 2016.

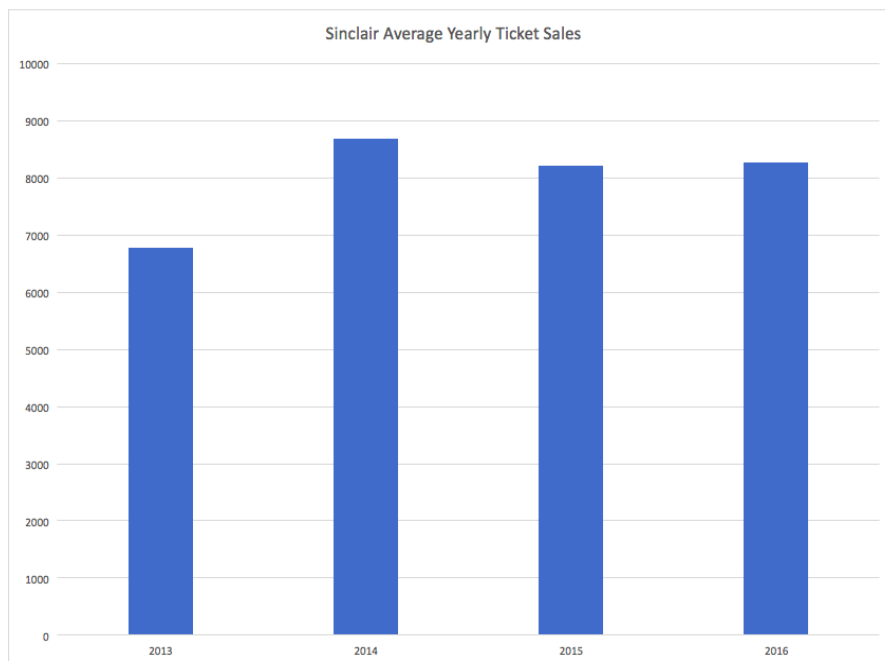


Figure 4: Sinclair average yearly ticket sales (Source: Pollstar Venue Tour History Report 2007-2017)

4.1 Positive effects of festival concentration

I would argue that the abundance in festivals on the east coast has actually helped the indoor club business, more so than it may have hurt it. Promoter (a) supports my findings: *"June used to be really quiet. Now there are more festivals on the east coast with Bonaroo and Firefly, and the ones in Montreal, that we will see more mid-week traffic at that time, which we weren't seeing before those were popping up, if you are outside the radius of those festivals you can come play Boston in be-*

tween. *It's good for the artist and its good for us.*" Where the increase of festivals may support the local promoter if they are slightly outside the radius, the party who experiences the greater negative affect is the smaller artist. According to the agent, music festivals and their radius clauses have completely affected how his artists tour and how they will route a tour. For a larger artist who is headlining festivals, they are likely to be receiving a disproportionate share of the income from the promoter, otherwise known as the Superstar Effect (Krueger 2005). Figure 5, is a redacted official contract from Boston Calling that shows the headlining artist was receiving an offer of \$200k with a bonus. However, for smaller artists, there are not getting paid nearly that amount and it's a battle in order to get a club show routed around some of the larger festivals such as Lollapalooza and Coachella. When you are the headliner of the festival, you have a lot more clout when it comes to what accommodations the festival is willing to make, whereas with a smaller artist, the deal they are offered might not have a lot of flexibility. Often agents will see half a dozen bands all trying to get booked in the same clubs over the same three-week period, as they all tour on the same festival circuit.

Artist:	[REDACTED]	Venue:	City Hall Plaza, Boston, MA
Festival:	Boston Calling	Festival Dates:	[REDACTED]
Offer Date:	[REDACTED]	Set Time:	HEADLINER - MAIN STAGE
Gates:	1:00pm - tbc		

Ticket Scaling	Total Capacity =	22,000	
	<u>Ticket Price</u>		COMPS: 20 tickets
Two Day (est. not to exceed)	\$	140.00	ANNOUNCE: tbd
One Day (est. not to exceed)	\$	80.00	

OFFER: \$175,000 flat plus \$25,000 bonus at 15,000 tickets sold
 Artist to supply airfare, hotels, ground transportation and backline.
 Any additional costs will be the sole financial responsibility of artist.

OTHER ACTS: TBA
 PRODUCTION: Local Artist Supplied

SIGNER / PURCHASER: [REDACTED]
 CONTRACTS SENT TO: [REDACTED]

VENUE ADDRESS: [REDACTED]
 PRODUCTION: [REDACTED]

MERCHANDISE DEAL: 80/20. 6.25% MA sales tax on all non-clothing items
 RADIUS CLAUSE: 120 miles 90 days before and after Festival dates

Offer is inclusive of all talent, transportation, accommodations, backline, risers and extra production. Any additional costs will be the sole financial responsibility of the artist.

Figure 5. Boston Calling Contract

In fact, in talking with the booking agent, when asked I if any of his artists had ever been directly affected by a radius clause, he responded *"all the time, in fact it's almost every single tour."* In order for bands that are lower on a festival bill to make it work, they need to have some plan in place before confirming the festival. The agent offered a few examples of strategies that he has implemented with some of his artists in the past. *"For example, before confirming Lollapalooza, we have to make sure to carve out certain markets we know we want to do. We'll tell C3 (the concert promoter for Lollapalooza) that we need Columbus and Detroit or else the tour can't route to the festival therefore making it impossible. Sometimes too, for smaller artists they be pretty lax, if you're booking the 1pm slot on the C stage at a festival, the promoter is not looking at your artist to really sell a lot of tickets, but you still need to get the OK."*

4.2 Festivals will always outbid a club promoter

Ex ante I hypothesized that artists might be performing in more secondary markets that they might not have performed at before, as a way to route to the festival and get outside the radius clause. However, it seems that the extent of the radius clause is so large, that even a lot of the secondary markets are off limits. The agent suggested as festivals such as Lollapalooza, Coachella, and GOV BALL, have radius clauses that extend to secondary markets such as Milwaukee, San Diego, and Philly, artists are performing less and less in these markets. These radius clauses may also to some extent see some smaller bands that are not as dependent on the festivals touring in more odd time periods, however it seems that the vast majority of artists are still *"living and dying by festivals."*

In my research, I found that the clubs are still doing a lot of business and did not see a huge loss in ticket sales that could be directly attributed to the festival, however the radius clause still does have an effect on what bands they are able to book in their clubs. Promoter (b) says that there indeed had been instances in which certain artists are not attainable because of the festival, which is generally a 6-month window. When

asked about strategies that a promoter might try in order to entice an artist to take a hard-ticketed show over a festival, he adds, *"I don't think you can outbid festivals without going upside down so I tend to say let them make the big money when it makes sense and then play for their fans on headline shows when it makes sense on an album cycle."* Promoter (a) shares a similar sentiment here: *"The major festivals are always going to win on the money side of things. If the festival really wants someone you will never get it."* However, both promoters did infer that with a smaller festival, there might be the opportunity at times to do some outbidding. For example, outside of Boston Calling you have Newport Folk, and that's a festival where a promoter might have the opportunity to entice an artist money wise with a hard ticket play, more so than a festival play because their economics are way less and they can't afford to pay the artist as much.

From the agent side, it seems to be that there are many instances in which the agent will suggest to the band to do a festival play, instead of a hard-ticketed show. According to the agent, *"there are lots of reasons to take festival offers, start of a cycle or not. If you play a show in say Chicago and sell 5,000 tickets that's great but simultaneously If you play a festival instead in front of 60,000 people and it gets attention from national media and websites, that resonates in other markets in ways that the hard ticket show won't."* It is not surprising that the agent and promoter have opposing opinions as they are looking out for their respective interests. I would argue that the key takeaway from this is that if an artist needs to make a big impact at the start of an album cycle, playing a festival will not only provide them with a much larger offer, but it can also provide them with a much larger platform to perform in front of larger audiences and key media outlets.

With the festivals having such a large pull on the artist by being able to offer them more money, and the opportunity to play in front of so many people, I wanted to explore whether or not artists had ever been confirmed to play a club show, and then a festival offer had come in and they are forced to cancel. It turns out that this situation does arise from time to time. According to the agent, *"it's less and less now that festivals*

are booking so far in advance, but I will tell the festival from the start that this show is confirmed, and it is not moveable. Usually that works and they still offer if they really want the band. Every once in a while, though the festival offer will be one that just can't be dismissed, at which point I need to tell the club promoter. Most of the time they are understanding, but I think that's at least partially because I don't take cancellations lightly. If I cancelled stuff all the time, they'd get a bit more upset."

It seems that this type of scenario arises slightly less for the promoters, but they will find agents who will try and drive their guarantees up if there is the demand. According to promoter (b), *"we have had artists looking at headline plays in the market and also at the festival offer, but given the festival offers are typically substantially more money they typically take that. However, some agents use both scenarios to leverage the guarantees they can get for an act in either scenario."* It seems then that the process for booking club shows in Boston, is more or less very democratic. Promoter (a) adds, *"We've never had a band confirmed for a date and then pull out because they had a festival offer but have had bands sit on things for longer in the hopes that they get a festival offer and then take that."* While promoters might not necessarily have had an artist pullout from an already confirmed gig, a few of them have experienced not being able to book artists they were targeting because of them getting a festival offer.

4.3 A relationship business

As music festivals have come in and established themselves in the backyards of concert promoters whom have been doing business for years before their arrival, how have the relationships changed between the booking agent and the local concert promoter, and what is the relationship like between these local concert promoters and the festival itself? It seems that the biggest effect has been on the booking agent, but not in the way in which I originally had anticipated. The agent says that his relationships have changed to an extent due to doing less work with local concert promoters. To him, as you start doing less shows with cer-

tain promoters, you begin to lose that rapport that helps you get the best deals, and good opportunities. The festival itself, and the radius clause may have slightly shifted what promoters are able to do, but strategically it has not really changed how Bowery/AEG operates. Promoter (a) says that they view the festival as just another competitor in the market, and that's not necessarily a bad thing. *"Certainly, the more people that are seeing live music, the better off it is for anyone working in the live music business."* In one way, festivals actually can help create more of a culture of going out and seeing live shows, which can get people thinking that they can spend more free time going to concerts, especially if someone discovers a band for the first time at a festival and goes to see them when they come back to perform at a club. Webster et al (2018) further agree and concluded in a recent study that live music enhances social bonding, is mood-enhancing, provides health and well-being benefits, is inspiring, and forms part of people's identity.

Additionally, it seems that Live Nation in Boston feels similar in regards to the festival. Promoter (b) says that *"since most of the large festivals are booking 12-24 months out, most of the acts are playing a show in the market before their festival play."* The problems arise when artists set out to do a festival play, and then come back around to do a headlining date too soon after. Promoter (b) adds *"the smartest time to play a festival is towards the tail end of your cycle. The festivals need headliners, they need content. You can go play your headline show, and then come back and play the festival, and then you can come back and get paid even better to play a show for a play that you don't really have much pressure to sell any tickets."*

In the eyes of the festival promoter, they are merely going after bands that they like. Boston Calling does not look to cut out the promoters in the local market, and certainly do not hold a grudge if they are not able to get a certain artist. According to the festival buyer, *"Eventually it all comes around and works itself out - we're all here trying to do our job, its already a tough enough job as it is, so you don't really try and pay attention to things that you have no control over."* Additionally, when Boston Calling hired an internal talent buyer, there were a number of

obstacles that he faced. Coming into a city that he was not familiar with, he needed to find his foothold in a market that has a long history with promoters such as Live Nation, Bowery, and legendary venues like the middle East. When Bowery was booking the festival, there were 4-5 people from the company that were all taking part in booking the festival. Once Boston Calling hired their own buyer, it was a one-man job.

Another question relevant to effects on the market is how the official after parties for the festival are coordinated. One of my initial theories was that because of the price of admission to the festivals, fans of a particular band might miss their performance in the market. Are after parties a strategy to solve this, and are they exclusive to one promoter in this market? According to the talent buyer, they are merely using existing relationships. He says: *"We don't look to do a ton of after shows, but some bands like to do the after shows because they like the intimate setting and some bands need a little bit more money, so it's a way to make more money and offer a different experience for the fans."* It seems then that the festival is cognizant of the limited fan experience, and they are trying to offer as many experiences as possible, without taking away from the festival itself. According to promoter (a), there's even times when Bowery/AEG will look through the line-up and look to curate their own after shows. Again, the exclusive relationship with Bowery was merely a continuation of the pre-existing relationship with the festival, and not looked at as a way of shutting out other promoters in the market. Part of the reason that the after shows continue to happen as well is because Crashline (Boston Calling Promoter) does not have a venue presence in the city.

Boston Calling 2013-2017
195 Artists

Sinclair: 2
House of Blues: 2
Official Afterparty: 2
Fun., The National, The Shins, Of Monsters and Men, Young the Giant, Marina and the Diamonds, Andrew Bird, Matt Kim, Portugal. The Man, Dirty Projectors, Ra Ra Riot, Cults, The Walkmen, Youth Lagoon, MSMR, St. Lucia, Caspian, Bad Rabbits, Vampire Weekend, Passion Pit, Kendrick Lamar, Local Natives, Major Lazer, The Gaslight Anthem, The Airborne Toxic Event, Wolfgang Gartner, Solange, Bat for Lashes, Los Stradamas, Deer Tick, Okkervil River, Fume, Lucius, Big Black Delta, You Won't, Bearonaut, Back Johnson, Death Cab for Cutie, Modest Mouse, The Decemberists, Edward Sharpe and the Magnetic Zeros, Brand New, The Head and the Heart, Megan and Sara, Bastille, Benny Lewis, Frank Turner and the Sleeping Souls, The Neighbourhood, Phosphorescent, Built to Spill, Kurt Vile and the Violators, Walk Off the Earth, Warpaint, Cass McCombs, Maximo Park, The Districts, Tiger Man WOAH!, Magic Man, The National, Lorde, The Replacements, Nas the Roots, Neutral Milk Hotel, Childish Gambino, Spoon, Girl Talk, The 1975, Volcano Choir, Twenty One Pilots, The War on Drugs, The Hold Steady, Lake Street Dive, Bleachers, White Denim, Sky Ferreira, Future Islands, San Fermin, S. Carey, Cliff Light, Gentlemen Hall, Beck, Pixies, My Morning Jacket, Ben Harper and the Innocent Criminals, Enacoustic, Fame Impala, St. Vincent, Vind the Radio, Marina and the Diamonds, Jason Isbell, Gerard Way, Tove Lo, The Fakers, Run the Jewels, The Lone Bell, Sharon Van Etten, Jungle, MØ, Love Makonnen, DMA's, The Ballroom Thieves, Krill, The Avett Brothers, Alt-J, Alabama Shakes, Hozier, Of Monsters and Men, Chvrches, Ben Howard, Chromeo, Walk the Moon, Nate Ruess, Father John Misty, Sturgill Simpson, Mister Wives, Daughter, Twin Shadow, Stephen Malkmus and the Jicks, Fidler, Doomtree, Gregory Alan Isakov, Grizfolk, Bully, Dirty Bangs, Grey Season, Sia, Disclosure, Robyn, DESZA, Sufjan Stevens, Haim, Miike Snow, Danielle Mon e, City and Colour, Courtney Barnett, Elle King, The Front Bottoms, ØRNS, Charles Bradley and his Extraordinaires, The Vaccines, Vince Staples, Battles, Unknown Mortal Orchestra, Christine and the Queens, Lisa Hannigan and Aaron Dessner, Lizzo, Palehound, Michael Christmas, Chance the Rapper, Boniver, Sigur Ros, Migos, Mac Demarco, Sylvan Esso, Car Seat Headrest, Francis and the Lights, Deerhoof, Whitney, Lucy Dacus, Vundabar, Xylouris White, Mumford and Sons, The xx, The 1975, Nathaniel Rateliff and the Night Sweats, Megan and Sara, Brandi Carlile, Majid Jordan, Dh Wonder, Danny Brown, Cousin Stizz, Russ [disambiguation needed], Strand of Oaks, Moses Sumney, Kevin Morby, Kay Maidza, Alexandra Savior, Tool, Major Lazer, Weezer, Cage the Elephant, Run the Jewels, Flatbush Zombies, Converge, Piebald, Wolf Parade, Frightened Rabbit, Buffalo Tom, PUP, His Golden Messenger, The Hotelier, Mondo Cozmo

Figure 6: Bands playing at House of Blues and Sinclair (Source: Pollstar Venue Tour History Report 2007-2017)

In examining the Pollstar data from both venues, I found 16 of 195 bands, which are highlighted in yellow in Figure 6, that happened to play on Boston Calling and perform a club show at House of Blues or Sinclair,

within that same year. This is to be expected, as many bands will not perform twice in the same market within the same year, unless they have a very 'hot' record. Of those 16 bands, there were only two that were official after parties. There are several limitations with this data. Since we are only looking at two venues, these bands could have performed at other venues that year in Boston. Additionally, Bowery also does after parties at their venue Great Scott, which was not included in this study.

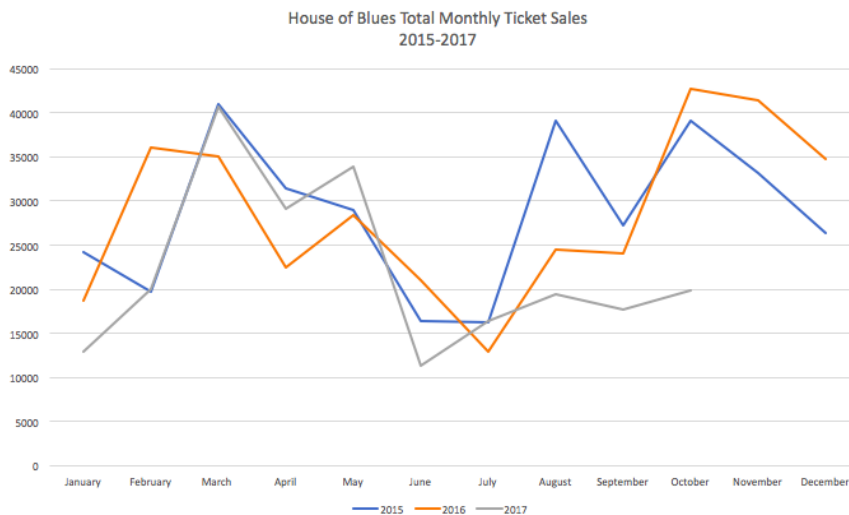


Figure 7: House of Blues total monthly ticket sales 2015-2017 (Source: Pollstar Venue Tour History Report 2007-2017)

In looking at the data set, there was no noticeable drop in ticket sales for these venues with the entry of Boston Calling. The graphs in figures 3 and 7 shows that both venues exhibit the same ticket selling trends year after year. I was also intrigued to see if the festival had any measurable effect on the guarantees for artists, and if agent and concert promoters were noticing if their prices were being driven up. According to the agent, guarantees for artists performing on festivals were gradually increasing until recently. To him, *"there seems to be much more heel*

digging." Now some of the larger festivals are realizing that they don't need to pay over the top fees as their brand gets more and more established. When it comes to the local market, neither Live Nation or Bowery/AEG have seen the festival driving up artist guarantees. According to promoter (a), *"thankfully we have not seen artist guarantees go up after playing a festival. Very rarely do they."* Promoter (a) further argued that Boston Calling, is also not a big enough festival where a strong play would equate to a bigger buzz for the band in the market. According to promoter (b), he does not see the festival being something that can lead to an increase of an artist guarantee, however he does find that when major promoters try to book the entire tour of an artist, they can drive up the local market price. *"Not as much because of the festival but because of AEG buying Bowery Presents and both AEG and Live Nation trying to book artists on a national and global scale to grab market share is driving up guarantees in Boston."*

Festivals clearly are using radius clauses in order to protect their financial investment in all of their artists, in hopes of selling tickets. For this year's Boston Calling, there were over 1,500 bands that were submitted by agents, and managers and the like, who were fighting to get one of the 43 time slots. As the festival bubble continues to inflate, what does the future have in store, and will it eventually burst? Across my interviews, there were a lot of parallels into what the future holds. According to the talent buyer, *"you're going to see your bigger festivals stick around, (GOV BALL, Coachella, Lollapalooza, ACL) but your festivals in smaller cities or communities that can only support it so much and then I think you are going to see festivals that have really strong curation stick around, as it will be back to the bands."* As we continue to be at a peak for music festivals, the environments that are very strongly curated and develop loyal fan bases are the ones that are going to stick around. Promoter (a) feels a similar way, but also foresees a future of Live Nation and AEG gobbling up and consolidating more festivals. *"I think festivals are in a positive way, here to stay. They were big in Europe, and then they weren't really impactful over here until the Coachellas and the Bonnaros really started things off, and it continued to grow from there, you*

are also starting to see a correction where some festivals have already started to retract and pull away, and festivals are getting cancelled because there is a little too much." In the US we have already seen how more and more music festivals emerge every year and not everywhere can sustain it. As many new events that pop up every year, we also see a significant amount that do not return after their first year. Just as how Live Nation and AEG purchased independent promoters, ticketing companies, and venues, promoter (a) also believes that we are going to continue to see these two large promoters monopolize the live entertainment space. "When you start to see Live Nation and AEG gobble up festivals, and artists for tours, you're going to see bands playing the festival for whatever promoter they are aligned with, and only the biggest festivals and the biggest headliners can get around that. Beyoncé is a Live Nation artist, but she's going to play Coachella (AEG owned), and that because Beyoncé is big enough, and Coachella is big enough, that they can carve it out. I don't really know who that helps. I can say that I don't really know how it helps the average consumer or concert goer." Promoter (b), agrees with this view of consolidation: "I see even more consolidation in the festival field. AEG, Live Nation and Madison Square Garden Group will be the dominant festival owners and there will be fewer independent festivals. But everything goes in cycles so after that happens, I think independent agents, promoters and festivals may become more popular. It all depends on how the bigger companies treat the artist and fans."

5 Conclusion

Despite having such steep restrictions put into place from the radius clause instituted by Boston Calling, both of the local promoters in the market do not seem to be experiencing lost revenue associated with radius clauses. With so many bands performing on the same festivals over the summer, this actually leads to increased traffic for some promoters in the market. Since there are so many territories that are 'off limits' because of the radius, the promoters who are outside of this

could actually be seeing more traffic than they were before. Additionally, in the Boston market, the trends in ticket sales have consistently followed a very similar path during the years of my study, and much before the festival was a presence in the market. With Boston being such a large collegiate city, you see a mass exodus of residents during the summer.

Furthermore, with many concerts being offered outside during the summer at places like Fenway Park, most indoor venues were seeing decreased ticket sales during the summer months. When it comes to monetarily compensating the artist, the local promoter will never be able to outbid the festival and take them away from the festival play, making it important for the local promoter to strategize the timing of the offer as there are many times that they will lose an act to the festival. The possibility of completely removing the radius clause from the festival contract does not seem like a likely solution and would ultimately lead to the cannibalization of the festival, as concert goers would potentially be able to pay less to see a certain artist for a lower price point. The higher on the bill the artist is, the more the promoter will be relying on them to sell tickets, and the less likely they may be to offer them the opportunity to perform near the festival proximity. For a smaller artist, they may be afforded the opportunity to "break" the radius clause if they are not a marquee name, so long as they negotiate their terms before signing the contract. However, with so many of the same artists all playing the same festivals all summer, it becomes very competitive to affectively route performances from festival to festival.

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Live music ecologies and festivalisation: the role of urban live music policies

Erik Hitters & Martijn Mulder³

Abstract

Many cities consider their live music ecologies to be a valuable asset to urban culture. Many have adopted active live music policies, which is part and parcel of the trend of instrumentalization of urban cultural policies. In this paper we explore the reasons behind the increased political policy attention to live music and we will examine how these policies deal with the changing landscape of live music and events and the trend of festivalisation. We argue that festivalization has become a widely applied policy configuration which has far reaching effects for urban cultures. Its implications can only be understood by looking beyond the instrumental use as an urban growth strategy or as the mere effects of the numerical increase of festivals.

Keywords: Live music industry, festivals, urban cultural policy, Netherlands

1 Introduction

In most cities in advanced economies around the world increasingly live music has moved to the centre of attention for urban cultural and development policies (Mazierska et al. 2020; Van der Hoeven & Hitters 2020). This is not surprising because live music has many positive effects on urban cultures. While traditionally urban cultural policy was aimed at fostering high culture, the last decades have shifted the focus of policy to more popular forms of culture. Live music is one of those areas of which cities around the globe have understood its value, be it cultural, economic or social. It can create jobs, boost a city's image, it can put it

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on the map as a tourist destination, it can contribute to social cohesion and the inclusion of diverse populations and it significantly adds to the urban cultural attractiveness and atmosphere (Webster et al. 2017).

Live music policies have specifically focused on the infrastructure of live music venues and their programming as well as on music festivals and events. For many cities, fostering live music ecologies has been mainly justified by the economic impact of the return on investment in the live music industries. We argue that this is part and parcel of the trend of instrumentalisation of urban cultural policies (Van der Hoeven & Hitters 2020). In this paper we will take a closer look at the reasons behind the increased political policy attention to live music and we will examine how these policies deal with the changing landscape of live music and events and the trend of festivalisation. Much in line with the seminal work of Hausserman & Siebel (1993) and later applications by Jakob (2013) we argue that festivalization has become a widely applied policy configuration which has far reaching effects for urban cultures. Its implications can only be understood by looking beyond the instrumental use as an urban growth strategy or as the mere effects of the numerical increase of festivals (Mulder, Hitters & Rutten 2020).

We will first explain the backgrounds of policies for live music, including a discussion of the opportunities that these policies have provided for the live music business to develop. Next, we will look more closely at three cities in the Netherlands – Amsterdam, Rotterdam, and Utrecht - and compare the way they deal with live music. Specifically, we will look at the way that the live music industry is embedded in the local live music ecology. In addition, we will also look at the different ways in which these cities both regulate and stimulate the live music industry.

This paper is based on a qualitative thematic analysis of 14 in-depth interviews with directors of pop music venues and festivals. In addition, we refer to various policy documents, which have been collected for this purpose.

2 The emergence of live music policies

Regulation of live popular music is not new. Historically popular music has mainly been approached as a policy challenge, which viewed youth's consumption of music as a source of nuisance and violence (Nuchelmans 2002). This changed with the instrumental turn in cultural policy, which may be broadly associated with the rise of neo-liberalism in the 1980's. Especially in cities around the world a new approach to urban development was adopted instrumentalising both high and low culture as a new strategy for urban development and regeneration. This newfound symbolic economy (Zukin 1995) or cultural economy (Scott 2000) became widely recognised as a competitive advantage for cities. In the new millennium creative industry policies progressively implemented a more inclusive focus on creativity, popular culture and events (Pratt & Hesmondhalgh 2005). These were believed to reach out - much in line with Richard Florida's work on the creative class (2002) - to new young, talented and multicultural creative populations in the city. Thus, the original focus on high culture was supplemented with a focus on popular culture. However, as budgets for investment were scarce these competing areas of attention needed to provide evidence of their effectiveness. Live popular music not only had significant economic impacts, it also was able to fulfil social and cultural goals (Van der Hoeven & Hitters 2019). Van der Hoeven & Hitters (2019: 264-265) observe overlapping policy objectives in live music policies, *"with cultural infrastructure policy at the primary level, aimed at the development of a professional cultural domain on the axis between art and popular culture. Secondly, a policy of economic return is added, to enhance the image of the city and strengthening it as a cultural and a creative city. On the third level, social issues of participation, education and citizenship come to the fore, using creativity and popular culture in order to tackle specific urban problems and to add to the city's attractiveness as a creative city"*.

There are two policy approaches which are relevant to understanding the ways that city governments deal with the live music. On the one hand there is the role of government as facilitator and stimulator of (economic) development. Cities can actively support and fund activities

and infrastructure as well as create a favourable environment for private investments and entrepreneurship. On the other hand, government can regulate and restrict, thereby actively steering development away from undesirable directions. Both are clearly present in live music policies. Thriving popular live music ecologies are, especially in European cities, actively stimulated by city governments. In addition, the boom in live music festivals, often referred to as festivalisation, is not only the result of emerging business opportunities and smart entrepreneurship. It is often, as we will also argue further on, the result of dedicated live music and festival policies, which were adopted in many places as ways of promoting the city, regenerating neighbourhoods, attracting tourism and improving the city as a business location (Jakob 2005). The city of Rotterdam, with its dedicated 'Rotterdam Festivals' coordinating body since 1993, is a case in point. As indicated above, policies inspired by creative class and creative city theories, have embraced the festival as a way to boost urban development and other external effects (Florida 2002; Landry 2000). Likewise, Lobato (2006), adopting a creative industries discourse, has pointed to the ways in which live music venues and festivals may contribute to innovation as places for knowledge exchange and networking. Often, cities also make active use of their music heritage and the associated mythology thereof (Frith 2007) to add to their image of a creative city and attract business and tourism. Good examples are the cities of Hamburg and Liverpool, both of which extensively use the legendary status of The Beatles in placemaking and city marketing.

Regulation on the other hand is often needed to overcome or prevent possible negative effects that are associated with music venues and festivals. The numerical increase of festivals has resulted in a lively debate in urban politics about the limits of that growth. Many cities now adopt strict licencing regulations in order to prevent nuisance and damage from festivals (Van der Hoeven & Hitters 2019). The downside of this is that there are less business opportunities for festival organisers. Live music promoters and event organisers must comply to strict regulations for safety, crowd control, health etcetera. For this reason, festival organ-

isation has developed into a professional industry within the scope of a few decades. In addition, many venues are under increased scrutiny for the possible noise and nuisance that they may cause for their direct environments. Furthermore, the abovementioned strategic usages of live music for revitalising the city may also have negative gentrification effects. The latter may also require government regulation to prevent displacement low income groups (Gibson & Homan 2004). But also, for the venues themselves, gentrification can have negative impacts as it may increase restrictions on noise levels and safety regulations. There are many examples of small venues that have been forced to close down as a result of gentrification effects.

Clearly, policy making on live music needs to draw from both above perspectives. On the one hand it may use live music's perceived merits for developing a flourishing live music ecology. Such policies may stimulate the supply of a diverse range of live music in venues and festivals to cater to different tastes, to add to the cultural vibrancy of the city, while also generating many positive externalities. On the other hand, it also requires the adoption of regulatory frameworks to counter and prevent the possible negative effects of live music events on the environment and the city. Thus, live music policies need to carefully balance interests from the music industry, festival organisers, venue owners, residents, and many other stakeholders.

In the next section we will first focus on the rise and professionalisation of the festival industry in the Netherlands, followed by a closer exploration of three cities in the Netherlands. In these cases, we investigate the ways in which cities deal with the challenges of live music policies against the background of the changing urban landscape, diversifying music supply, competitive music industries and increasing festivalization.

3 The rise of the Dutch festival industry

Arguably, The Netherlands is amongst the countries with the highest festival density in the world (see e.g. Martín-Corral et al. 2015). The es-

estimated number of Dutch music festivals in 2019 ranges from 613 to 1,123 (see table 1). The substantial difference between the available data sources can be explained by the different definitions and measures that have been applied (Respons Market Research only includes festivals with over 3,000 visitors in their analyses).

Database (2019)	Source	# Festivals	# Music festivals	Website
Festival Review	EM Cultuur	1,115	613	www.em-cultuur.nl
Festival Monitor	Respons Market Research	1,020	765	www.respons.nl
Festival Atlas	Amsterdam University of Applied Sciences	1,444	1,123	www.festivalatlas.nl

Table 1: Number of music festivals in The Netherlands in 2019, based on three data sources

The analysis of both the annual market entries of Dutch music festivals and the media attention for festivalisation, show a rapid growth in the number of new festivals from 2005 onwards and a rapid growth in attention for the phenomenon of festivalisation from 2013 onwards, emphasizing the fact that festivalisation in The Netherlands should be seen as a relatively recent development.

Both, figure 1 and table 1, support the thesis of festivalisation in The Netherlands. To better understand the development of this trend, we conducted an historical analysis based on the data sources presented in table 1. We mapped the chronology of first editions of Dutch pop music festivals and based on this timeline we can define five different stages of development (see table 2).

After a short period of multiple initiatives related to the 1960s hippie culture and inspired by US festivals such as Monterey Pop Festival in 1967, the 1970s and 1980s can be characterised as the low season of the Dutch festival history. The legacy of these decades on the current festi-

val field can be found in festivals oriented at celebrating social cohesion such as the nationwide liberation festivals (from 1981 onwards) and festivals promoting cultural diversity such as several world music festivals. The growth and development of the Dutch festival industry accelerated in the 1990s, a decade characterised by the rise and commercialization of electronic (house) music and by fact that alternative music (e.g. grunge) became mainstream catalyzed by the popularity of CD's and music television. In this decade the Dutch dance industry was established with its first wave in the city of Rotterdam (hardcore house) and a second wave in the city of Amsterdam (trance, techno), with festivals such as Sensation as a typical example.

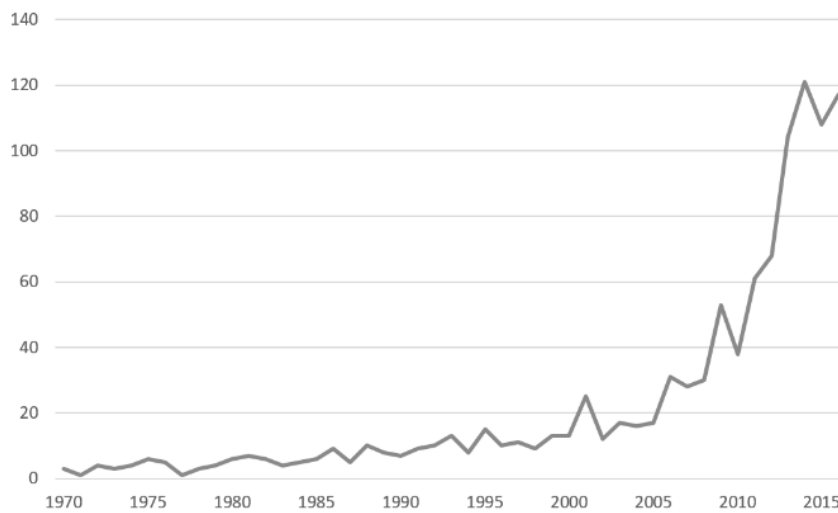


Figure 1: Annual market entry of all the Dutch music festivals that took place in 2016 (n=1,070). Source: Festivalatlas 2016 (Van Vliet 2017)

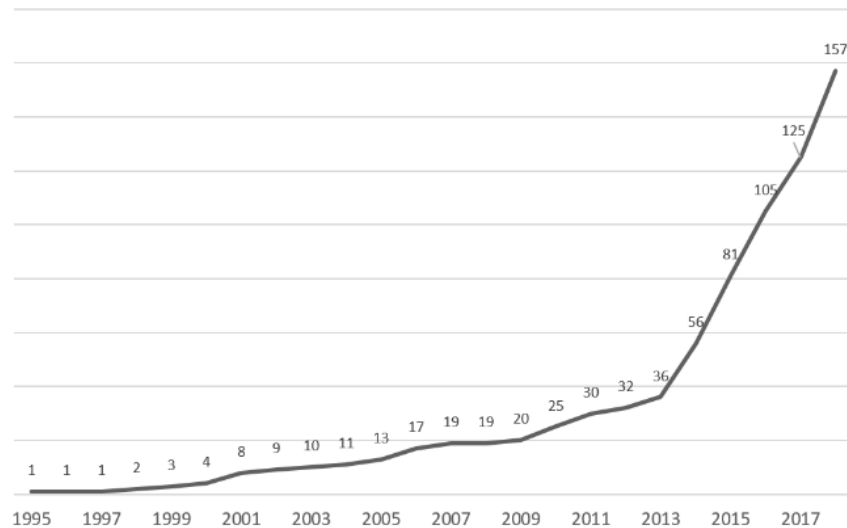


Figure 2: Cumulative use of the term festivalization (in Dutch: festivalisering) in Dutch national and local news media between 1995 and 2018. Source: Nexis Uni 2019

Most festivals that were organized during the 1990s were able to accommodate crowds of ten thousand visitors and as a result, most were located in non-urban areas. This started to change in the new millennium, predominantly because cities began to believe that festivals could be understood as an effective urban amenity. Cities such as Amsterdam and Rotterdam actively invited organisers to use the city as a festival ground. For this reason, multiple initiatives popped up in the urban port areas in the north of Amsterdam. This development marked the start of what could be defined as hyperfestivity (Richards 2010), an extensive range of music festivals in different sizes and with different styles, increasingly held in (dense) urban areas. This model of growth continued until approximately 2016. From this year onwards, the data sources presented in table 1 started registering a stabilization and even a decrease of the number of festivals. The market seemed to be saturated and the policies in cities such as Amsterdam became more restrictive.

In all probability, the 2020 Covid pandemic will continue and likely even accelerate this process of selection and decrease.

Phase	Period	Name	Characteristics	Stereotype
1	1966 - 1970	Post-Monterey: try-outs	Several, relatively large-scale festivals were organised, inspired by Monterey pop festival in 1966. Most of them were one-off and were faced with financial losses.	Holland Pop Festival, Rotterdam (1970)
2	1970 - 1990	Low season: culturally and socially responsible	Two decades of a relative calm after the storm in the Dutch festival landscape. A lot of the new festivals that did occur in these years, focused at themes related to multiculturalism (world music) or societal issues.	Liberation Festival, Amsterdam, Haarlem & Wageningen (1981 -)
3	1990 - 2008	Going big: Techno and alto become mainstream	The rise of MTV and the Compact Disk coincided with the popularity of alternative grunge music and house and techno. MTV made these genres mainstream, leading to the birth of large scale rock and house festivals.	Sensation, Amsterdam (2000 - 2017)
4	2008 - 2016	Hyperfestivity: your own personal EDM-fest	The big boom in the number of music festivals. Biggest growth in dense urban areas; a shift from large scale to smaller urban festivals, mainly EDM and hiphop.	Expedition Festival, Rotterdam (2013 -)
5	2016 -	Natural selection: boutique and cross-overs	In a saturated playing field, festivals focus at quality and creating a unique visitor experience. Being special is preferred above being the biggest. Increasingly a concept or theme is leading and not the music program.	Elrow Festival, Amsterdam (2018 -)

Table 2: Five phases of the Dutch festival history

4 Live music policies in three Dutch cities

In the Netherlands, live music is increasingly subject to political debate and policy making. In most cities in the Netherlands, pop music is deemed important for cities and policies and funding schemes aimed at the support of popular music are widely accepted. Along with the increased popularity of live music in general, festivals have notably added to a flourishing live music ecology. The exponential growth of the festival industry since 2010 (see figure 2), has added to the complexity of live music policies in most cities. Festivalization needs to be understood as a societal phenomenon intertwined with changing consumer habits, social practices, emergent markets and developing government policies (Mulder, Hitters & Rutten 2020).

4.1 Amsterdam: Challenging festivalisation

Amsterdam is by far the most festivalized city in the Netherlands, and maybe even the world. In 2019 there were 126 music festivals in the city. The trend, however, was downwards. (Van Vliet 2020). Amsterdam

not only has the most festivals, it is also a city with a fine-grained infrastructure of music venues, from numerous pubs, to small multifunctional neighborhood venues and dedicated pop venues, among which the legendary *Paradiso*. As numerous respondents agree, many touring artists are drawn to the city's venues because of its image of vibrancy and tolerance. While Amsterdam has a very well-developed cultural policy, it seems to lack a clearly expressed policy with regards to popular music. Some of the key venues are subsidized to a limited degree, most of the city's live music scene is industry based and new initiatives often emerge from the existing live music ecology. Two notable examples are the *AFAS Live* stage (for 6,000 visitors) and the *Ziggo Dome* (17,000 visitors), both of which are owned and operated by *MOJO Concerts / Live Nation* and located in the less densely populated south of the city, close to the city ring and train stations.

A professional festival culture in Amsterdam arose in the 1990, boosted by ID&T (the organising company behind *Sensation*) and inspired by the vibrant local club scene (e.g. the former *iT* and *Roxy*) at that time. As outlined in table 2, a rapid increase in the amount of festivals in the city took place from 2005 onwards, partly as a result of the fact that the city of Amsterdam actively invited new initiatives to the city and more specifically to the former urban port areas north of the city such as the NDSM wharf. The vast majority of the music festivals that were organized in Amsterdam since, can be labelled as dance, electronic (EDM), urban or hip-hop (examples of the latter are festivals such as *DGTL* and *Appelsap*). The rise of the electronic and dance scene in Amsterdam culminated in the *Amsterdam Dance Event* (ADE), arguably the biggest global annual dance event. Although less prominent, Amsterdam also accommodates a vast number of pop, rock and indie related festivals such as *London Calling* and *Amsterdam Woods Festival*.

Respondents indicate that the debate in Amsterdam is dominated by the issue of the rising number of festivals – although declined in the last few years – and the associated issues of nuisance, noise and damage. City residents are very actively engaged in complaints procedures around licensing of festivals and they have been successfully mobilizing

protest against the 'festivalisation of the city'. With numerous festivals every weekend in the summertime, at various locations from parks to public squares, residents complain about noise, parking, pollution, damages to properties and parks, etcetera. Interestingly, the media have echoed these protests and the issue of festivalisation has become a media hype in the last years. As Mulder et al. (2020) have shown, based on the Nexis Uni news database, the term 'festivalization' has been used in the Dutch media since the late 1990s, and has increased in significance exponentially since 2013 (see figure 2). Most of these contributions in the media use the term festivalization to describe the rising supply of festivals in number terms, with the main focus being on the negative implications of this growth.

In 2018 the city designed a new event policy, aiming to strike a balance between a city where well-organized events can take place and the reduction of nuisance for residents. In particular, the policy places additional requirements on aspects of sound, sustainability, ecology and location profiles (Scholtens et al. 2019). For most venues in Amsterdam, festivals are not considered a threat to the live music ecology, they are welcomed as a part of it. Most venues observe positive mutual impacts, and some venues themselves have increasingly started to organize festivals as spin-offs of their own programming. One issue that is mentioned is increasing competition through the high fees that festivals tend to pay for headlining artists, which may pose a threat to especially the mis-sized venues.

4.2 Rotterdam: Programming the city

Contrary to Amsterdam, a dedicated policy for popular music was developed in Rotterdam since the 1980s. From then onwards subsidies became available for financial support of music venues and youth centres, which later became structural parts of the public budget for culture (Shapiro 2020). Very early on festivals were perceived as an important part of cultural policy in Rotterdam aimed at accessibility and participation of cultural activities. In the decades following WWII, during which Rotterdam was in a long-term process of reconstruction after the bomb-

ing of 1940, the city already implemented a strategy of quinquennial cultural events and festivals as an urban amenity in times of meagre cultural supply. In 1993 the city established a coordinating organisation called 'Rotterdam Festivals', as a direct result of the (organisational and financial) failure of the Rotterdam 650th birthday festivities in 1990. For live popular music this organisation was very important as it stimulated the professionalisation of festival organising. Arguably, this focus on festivals has left Rotterdam with less of a focus on brick and mortar venues than one might expect in a city of this size. Dedicated pop policy became fully fledged around 2007 when the Rotterdam Arts Council drew up a pop policy vision plan (Gemeente Rotterdam 2007). While it showed that Rotterdam was flourishing in terms of live music venues and club scene and that there was a strong collegial network, it also indicated that there was a gap in performance opportunities. This new pop policy selected core venues, which would receive structural funding but also called upon the sector to collaborate more closely. For a very long time public and political debate centred around the absence of a mid-size venue for popular music which could compete with similar venues in neighbouring cities Amsterdam, The Hague and Utrecht. It was widely believed that such a venue was needed to make Rotterdam a logical stop for international artists touring the European continent.

While a number of attempts were made to realise a mid-size venue for 1,000 to 2,000 people, the professionals working in the Rotterdam venues continued to collaborate, discuss and share programming opportunities. This collaboration came to be known as the Rotterdam Model, which effectively programmed the city with live music events. Bookers, event organisers, promoters and programmers, collaboratively organise concerts all over the city, not only in their own venues but also at other possible venues that would fit the expected audience turn out. It started to use several spaces all over the city which before had never been used for live music. The Rotterdam Model is a complex and interconnected system of urban music programming which emerged bottom up and not so much relies on the physical infrastructure, but much more on the network of trust between the people who are part of it (Shapiro, 2020).

It relies heavily on the quality of the city's live music ecology, which is considered strong by the respondents. It can use a broad network of different sized music venues, from very small too large and only very recently it consists of a dedicated music venue (*Maassilo*) which can hold up to 2,000 people, but interestingly – and in line with the Rotterdam Model – does not have its own programming, but is open to promoters from the other venues.

Interestingly, negative effects of festivalization are not considered much of an issue in Rotterdam. Festival organisers are included in the Rotterdam Model, while many of the venues also organise their own festivals, all collaboratively sharing venues and music spaces. While live music policy is well developed in Rotterdam, naturally, budgetary restrictions are felt throughout. Competition and risk are always part of the business of live music. The Rotterdam Model of strategic festival planning combined with a tight network of creative entrepreneurs and a citywide programming structure, was awarded as the global best festival city in 2010, 2015 and 2019 by the International Festivals and Events Association (IFEA).

4.3 Utrecht: The venue as festival site

The smaller city of Utrecht (population 360,000) has no dedicated policy for live popular music, but its cultural policy is very much oriented at infrastructure, especially where live music is concerned (Gemeente Utrecht 2020). The city has a well balanced infrastructure from small to large concert halls, venues and sites, for classical as well as popular forms. This is referred to as the chain of venues, implying that beginning artists to international touring acts can all be catered to. The infrastructural approach is integrated into the festival policy. This stands out because it actively uses the wide range of venues as festival sites (Beren-schot 2018). Notable are a number of classical music festivals and the *Le Guess Who?* festival, which take place in venues and sites all across the city. This is an exemplary niche festival, focusing on boundary-crossing, experimental music and in doing so attracting thousands of visitors from over 60 countries all over the world.

Focal point and one of the most important achievements of the city's live music policy was the huge *Tivoli/Vredenburg* venue. It was opened in 2014, replacing both a venue for pop music as well as a classical music venue in the city centre. It includes eight halls and stages with a total capacity of 5,500 people, including a venue for 2,000 as well as a seated hall for classical music for 1,700. It attracts over 1 million visits annually. The building is part of a large inner-city redevelopment plan and required a huge investment from the city as well as considerable structural annual funding. Inside this unique building, various concert spaces on nine floors are connected by walking routes, escalators and open squares and the building has café spaces, a restaurant and various smaller stages.

With this flagship venue, live music has become a central focus of the city's cultural policy. The budget that was reserved for the development was vastly exceeded, and discussions followed about the justification of these expenditures. This prompted the city council to confirm the importance of live music to the city, which was widely supported. In turn, the venue was increasingly called upon to become the 'city's living room', open to all and offering diverse and accessible programming. It naturally became the central hub of the city festivals, mentioned above. The venue's director even calls the venue an indoor festival site, which is emphasized by the building's qualities and flexible festival-like interior styling.

Festivals and live music venues have become blended in Utrecht, which is reflected in and reinforced by the city's policy. Nevertheless, respondents also see threats in the growth of festivals for the business of live music. Growing competition and exclusivity deals drive up artists' fees at the expense of regular programming and more risky styles and genres. That said, brick and mortar venues, as shown in this city, represent much more than just a place for enjoying music. They can be flagships for urban development, attractors of residents, visitors and tourists and enhance the city image as a music city.

5 Conclusion

The three case studies have shown that live popular music policies have been increasingly and actively developed as a part of wider cultural and event policies in these Dutch cities. Common denominator of these policies is the understanding of the positive values of live music, while being mindful of possible limits. These values, as argued above, encompass cultural, social and economic values and are acknowledged to enhance the qualities of cities as places for residence, business location, leisure and culture. Within the Dutch context, brick and mortar venues for popular music as well as pop festivals have become widely recognized as central assets of urban culture and the live music ecology in particular.

The three cities that were part of this exploratory study also show significant differences in their approach to live music. While there is a shared understanding of the necessity of engaging in live music policy, the instruments that are deployed to this goal vary considerably. In Amsterdam, capital of The Netherlands and the largest of these cities, the issue of festivalisation and its negative impacts have dominated public debate and called for the need for restrictive regulation. At the same time Amsterdam has also favoured the establishment of commercially operated large stages for live music, resulting in a fine-grained network of venues and a well-developed live music ecology, even while a dedicated live music policy was absent. Rotterdam, on the contrary, has explicitly developed a policy for popular music and particularly live music. A dense network of actors effectively programmes the city with live music events, cooperating closely and including stakeholders from both commercial venues, subsidized organisations, festivals and intermediaries. The 'Rotterdam Model' efficiently and effectively uses the city's live music ecology and offers a flexible and network-based alternative to more traditional infrastructure-oriented policymaking. Festivals have long been integrated into this approach. The city of Utrecht likewise shows an integrated approach to live music and festivals, but with a strong emphasis on infrastructure. However, the focal point of the live music policy in this city is the large *Tivoli/Vredenburg* flagship venue, which is part of the inner-city redevelopment strategy. The city's live

music ecology centres around this venue, which is being used for large city festivals and also functions as a public meeting place in the city. It is a clear example of the multi-layered nature of live music policy (Van der Hoeven & Hitters 2019).

Interestingly, we can observe a strong path dependency in urban live music ecologies. The provision of live music and festivals of each city and their respective policies can be explained by the history and identity of the city in question. In Rotterdam, therefore, the outcome is completely different from Amsterdam and Utrecht. Rotterdam, with its heritage as both an industrial and a reconstruction city was the first city to have a dedicated cultural event policy, more or less forced by the situation and the need in the 1990's to become a more attractive and livable city.

Within the multi-faceted live music policies that we have observed here, the issue of festivalisation remains a recurring issue in the debates around the future of live music. Festivalisation, as we have argued elsewhere, needs to be approached as more than numerical growth of festivals. Stakeholders in the live music industry perceive festivalisation as an inevitable reflection of contemporary society (Mulder, Hitters & Rutten 2020). That does not imply that it is without its challenges. Of course, the rising numbers of festivals pose clear problems in terms of environmental management and urban planning as well as competition for venues. Problems which may lead to public protests against festivals as in Amsterdam and subsequent policy intervention. But festivalisation is also strategy: for venues which are part of the existing infrastructure but also for urban policies which have actively engaged in the use of festivals in many ways as predicted by Haussermann & Siebel (1993). Case in point is the city of Utrecht, using large flagship live music venues to 'stage the city' in festivals as part of inner-city redevelopment strategies. Festivals have become integrated into urban policies, as much as they have become blended with music venues in dedicated policies, which aim to achieve a multitude of objectives.

This exploration of urban live music policies has revealed that there is growing appreciation in city politics of the values of live popular music.

However, this should not be taken for granted. Many of the policies discussed above show clear instrumentalization tendencies. However, the social and cultural value of live music needs to be fully understood as being as crucial as its economic significance (cf. Van der Hoeven & Hitters 2019). Notwithstanding that there have been ample business opportunities for the live music industry to develop new enterprises, large stages and festivals, there are also increasing pressures on the smaller venues and small festivals. Respondents noted increasing competition and risk for such enterprises as a result of festivalisation and gentrification. Budgetary austerity and recession have added to that. In addition, favorable policies for live music are sometimes counterbalanced by stricter regulation, which aims to overcome possible issues of nuisance, noise and environmental damage. For small stages and community festivals, such stricter regulations may be difficult to meet.

The above findings need to be interpreted within the national context of The Netherlands. With a strong legacy of active cultural policies, cities have always been supporters of culture including the cultural industries. This may be very different in other national contexts and calls for further research on the topic of live music industries and policies from a comparative perspective.

The sustainability and resilience of live music ecologies depends on many factors and is subject to both internal and external pressures. By far the most severe of threats has emerged early 2020 with the COVID-19 crisis. The sudden lockdown and discontinuation of live music performances had devastating effects on the live music industries. Bands stopped touring, bars shut down, venues closed and festivals were cancelled. It resulted in massive lay-offs in the live music and event industry, bankruptcies and hardships for musicians and ancillary free-lancers. It requires further investigation to assess the full consequences of this crisis, but it is clear that government support is needed to make sure that the industry survives.

6 Acknowledgement

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Trying to have an impact: Some confessions of a live music researcher

Martin Cloonan⁴

Abstract

This article offers the author's reflections on over fifteen years of researching the live music industry in the UK. It raises issues such as the role of academics, how to have impact and the meaning of value. Overall it suggests that impact can be found in various ways and that it needs to be built via establishing long term relationships while remaining impartial, to be collective and to involve some opportunism.

Keywords: Live music, music industries, music policy, impact

1 Introduction

This article offers some reflections on the policy and other implications of researching live music. It draws upon six research projects: Mapping the Music Industry in Scotland (2002-3), the History of Live Music in the UK (2008-11), Live Music Exchange (2012-), two projects on Cultural Value (2013 and 2014) and the UK Live Music Census (2016-2018). Each is summarised and lessons drawn before a concluding section draws the findings together.

Before continuing it is necessary to note that the paper deals with live music, something which can be characterised in economic terms as an *experiential* good. What is essentially being sold is something which the audience can imagine in its heads beforehand, experience at the event and then remember afterwards (Cloonan 2012). But the gig itself *cannot* be taken home, even if audience members or others video record it. A major aspect of live music - and something which helps some artists to command high fees - is the aspect of *being there*, of being present and involved. The fact that there *is* a "there" has important implica-

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tions because it implies a *place*. This immediately brings up a series of questions. What is this place? Where is it? What are the conditions of access? What can go on inside that place? When? How? And so on. As will become more apparent as the paper progresses, all of those questions have *policy* implications, something to which I now turn.

2 Project 1: Mapping the Music Industry in Scotland (2002-03)

This report was funded by Scotland's major public economic agency, Scottish Enterprise and was a result of perhaps unique political circumstances – viz the establishment of the Scottish Parliament in 1999, which raised expectations in many circles that the Parliament would be able to do something to help their needs. That included the Scottish music industries where leading figures appeared to be united in the view that *"we've got a parliament, it should do something for us"*.

One way to achieve that "something" was via lobbying. The focus for this came to be a Cross Party Group on the Contemporary Scottish Music Industry which was established in December 2000 and soon put pressure on the country's public bodies to "do something" for the country's music industries.⁵ The main focus of the Group's lobbying was the country's main public economic agency, Scottish Enterprise. The response from that organisation, was to do what a lot of organisations do in such situations – commission a report. It did this in 2002 when it issued a tender to research the condition of the music industry in Scotland. I formed a team of three to bid for the work. The first addition to myself was Simon Frith, the world's leading popular music scholar who was then working at the University of Stirling. The second was John Williamson, who is very well known in Scotland's music industries within which he has performed a number of roles of which the highest public profile was that of managing the band Belle and Sebastian. Our tender was successful and the research we subsequently undertook was a clas-

⁵ I use the term music industries (plural) rather than music industry (singular) for reasons, which are fully explained in Williamson and Cloonan (2007).

sic combination of qualitative and quantitative methodologies, being a mixture of economic analysis culled from various sources and designed to get an overall value of the industry, combined with case studies of interesting companies and organisations.

We believed that our final report presented an accurate portrayal of the contemporary state of the Scottish music industries and so were rather bemused by the hostile response, which it elicited in some quarters. First the figure we arrived at for the overall value of the industries was seen in the press as indication that the Scottish music industry was in crisis.⁶ In fact report did *not* suggest things and soon after the worldwide success of Franz Ferdinand countered at least some of this negativity. Next, the publicly-funded Scottish Music Centre which had promised to host the report on its website withdrew the offer following what appeared to be a whispering campaign against us. Others within the industries complained that we hadn't consulted them, when we had – albeit not to the extent that they wished. The funders then objected to one of the findings being highlighted in the executive summary, although they were happy to include it within the body of the report - a dispute delayed publication by at least a couple of months.

In retrospect it is clear that the political context was the determining factor here. In the early days of political devolution in Scotland every organisation and company was coming to terms with new political settlement – and trying to get something from it. In such a partisan context a report which was neutral and favoured no particular faction was unlikely to elicit support. Ultimately the main impact that report had was not on the funders - who ultimately ignored it - but within academia as it spurred both writings and further research. We wrote about the politics of the report in a number of places (Cloonan et al. 2004, Williamson et al. 2011) and it led to two articles, which bear highlighting.

The first was called "Rethinking the music industry" (Williamson & Cloonan 2007). Here we noted that at the time of the 2002 report there was a tendency amongst journalists, academics and industry organisations to use the term "music industry" when more often than not what

⁶ See Cloonan et al. 2004 for examples

they were actually referring to was the record industry – and more particularly the major record companies. However while our research in Scotland had illustrated a great deal of musical and related business activity, it also showed that the country had few large record labels and certainly none of the multinational major record labels, whose UK bases were in London. In an effort to be more inclusive and to recognise the importance of other areas such as live music and publishing, John Williamson and I developed the notion of the music industries, plural, rather than singular. The article spelt out the implications of our approach. This has proved to be fairly influential and the term music industries is now widely used in academic circles (c/f Anderton et al. 2013, Hughes et al. 2016). Importantly the origins of this notion can be traced back to the *Mapping* report and the thinking, which emerged from it.

The second article was called "Having an Impact" (Williamson et al. 2011) and contained our reflections on that report, on some academic work which seemed to us to be pure advocacy on behalf of its record industry funders and on the music industries' attempt to discredit academic work which did not support their vested interests. We argued that academics should be public intellectuals carrying out research in the citizen interest and having the confidence to trust their expertise. Such lessons were again drawn from our experience of working on the report. Another lesson was that even if the funders and music industries personnel dislike your research findings and a report, which you have spent months on has no immediate impact on policy, the work undertaken can still inform your own thinking and produce some influential academic work which can influence policy in the longer term.

3 Project 2: The History of Live Music in the UK (2008-11)

This project also emerged out of the *Mapping* report. It ran between 2008 and 2011 and was funded by the Arts & Humanities Research Council (AHRC). I was co-investigator on this with Simon Frith. Working on the *Mapping* report, had brought home to us not only how important the live music industry was, but also how under-researched it was. As

noted above, at this point for most academics "the music industry" meant the recording industry and the live music industry was either ignored or viewed simply as a means via which to sell records and so not researched it. Having spotted this gap, we applied for funding to research the history of the UK's live music industry and eventually secured funding for a three-year research project on the postwar history of the UK's live music sector.

This project entailed the hiring of two researchers. The first of these was Matt Brennan, whose job was to help build a historical account of the development of the industry, largely via trawling through the UK music press and other relevant sources. The second was Emma Webster, whose job was to provide an account of the contemporary industry through going to events and talking to everyone involved - promoters, musicians, fans, venue staff etc. Both researchers conducted interviews with various music industries personnel, with the focus being on concert promoters, from the local to the stadium level. We conducted numerous interviews with promoters, gathered solid historical data and combined these with contemporary accounts, thus developing a rounded picture of the postwar development of the UK's live music industry.

The wider music industries context for this work was that of the relative decline of the recording sector and the rise of the value of live music, which can all be seen as occurring around the time of Napster in 1999. In the UK the value of live music exceeded the value of recorded music for the first time in 2008 and this has continued ever since.⁷ Our research had identified this phenomenon much earlier in Scotland and we felt ahead of the game. There were various outcomes from the live music history project including a three part history of the UK live music industry part one of which has been published (Frith et al. 2013) and parts two and three of which are forthcoming (Frith et al. 2019, 2020). Other work included a PhD (Webster 2001) and two special editions of journals.⁸

⁷ See reports by Page and Carey: 2009, 2010 and 2011, PRS: 2012 and UK Music: 2014-2018.

⁸ *Arts Marketing*, 1:2 (2011) and *Social Semiotics*. 22:5 (2012).

Thus, the project produced the customary academic outputs. However, in the longer term, it was to be the policy implications of the research that had perhaps the greatest impact. By the time the live music history project started, I had already written a book on popular music policy in the UK (Cloonan 2007b) and as a team we have all realised that live music was much more complex in policy terms than recorded music – and probably more interesting, especially areas such as regulation and funding. As I have noted elsewhere: *"the provision of live music automatically raises a set of issues which are not present with recorded music, prime amongst which are those of health and safety and the regulatory framework surrounding the selling of alcohol"* (Cloonan 2011: 406).

While in and of itself the Live Music History project had few direct policy implications, it informed our thinking in a number of areas. In addition, we were developing expertise and becoming the "go to" people for academic thinking around live music in the UK. One manifestation of this came when we were asked to give legal advice about a dispute involving a long running Scottish festival. Another was that we began to interact with Hamish Birchall of the Live Music Forum who was campaigning to reform the licensing regime for live music in England and Wales and to whom I shall return. Overall, the Live Music History project reinforced our sense that there were important policy areas around live music - and that history could help us to understand more about them.

4 Project 3: Live Music Exchange (2012-)

By the time the live music history project ended in 2011 the funders, the AHRC, had announced that successful projects could now apply for follow up funding for new projects which flowed from the original one but were not just a continuation of it, a scheme which still exists.⁹ We responded by developing the idea of an online portal and consultancy service for anyone interested in live music - including music industries personnel, local authorities, campaigners, academics, musicians and

⁹ See <https://ahrc.ukri.org/funding/apply-for-funding/current-opportunities/followonfunding/>

fans. This project was named Live Music Exchange (LMX¹⁰). Our funding application explained that LMX would provide an accessible archive of reliable research, examine best practice, develop music business training and help promote better public understanding of the live music industry.

The funding was for twelve months and was used to employ researchers, develop the website and stage various events discussing the state of the UK's live music sector. This resulted in us making still more connections within that sector. By this point we pretty well known within live music industry circles, something which we further developed via having key industry people on the LMX Advisory Board.¹¹ In the longer term LMX has been maintained by through small pieces of funding from our host institutions and our own voluntary work. However, it remained – and remains – a key calling card and *nom de guerre*.

The bigger academic context here was an increasing interest in universities in what was first called knowledge transfer – implying that academics transfer their knowledge to industry and the public; then knowledge exchange – more of a meeting of equals, and is now called impact. We received AHRC funding for LMX because the AHRC follow up funds were designed to facilitate impact and our bid was built upon notions of knowledge exchange.

As ever, the wider political context was important. In this particular case one key development was a campaign about the licensing of venues in England and Wales. While this is a complicated story, in essence the 2003 Licensing Act had stipulated that any premises which were licenced to sell alcohol and which also wanted to stage live music had to have a separate licence to stage the musical performances. Both licences had to be paid for. Prior to this gigs of up to two performers on licenced premises did not need a licence under what was known as the "two in a bar" provisions of the 1964 Licensing Act (Cloonan 2007). The effect of the 2003 Act was therefore to make illegal a whole range of musical activities which had previously been entirely legal. Campaigners were soon claiming that the overall number of gigs was declining as venues did not

¹⁰ See www.livemusicexchange.org

¹¹ See <http://livemusicexchange.org/about/>

wish to pay a licence fee for something which had previously been free. In sum, a reform of alcohol licensing was reducing the amount of working opportunities for live musicians.

The legislation was eventually opposed by the Musicians' Union and other campaigners and we found ourselves allying with them and providing support. This led to us writing to the Statistics Authority to counter their claim the live music industry was "thriving".¹² This came as result of our developing relationship with Hamish Birchall and the Live Music Forum campaign and was based on our finding during and after the Live Music History project. In short, campaigners were saying there is a problem here, the government was denying it and we were suggesting that official interpretations and announcements were misleading.

This dispute became part of a broader campaign which continually sought to undermine government claims that the 2003 Act was not having a detrimental effect on live music. Our intervention helped to put the government on the defensive and to give legitimacy to the claims that the 2003 Act was causing problems for live music. This was eventually to lead to reform via the 2012 Live Music Act which permitted amplified gigs of up to 200 people and all acoustic gigs to take place without the need for a licence. Importantly this was not a government measure but came via a Private Members' Bill in the UK parliament. Such Bills are a means via which individual MPs and Lords can get their own legislation put forward for consideration. In this case it was promoted by a member of the House of Lords, the Liberal Democrat Tim Clement-Jones, with whom LMX had also liaised.

There was thus a change in the law, which LMX had helped to inform via working with Birchall and Clement-Jones. While part of a much broader campaign, which included the Musicians' Union (with which we also enjoyed a working relationship), we had actually contributed to the changing of the law which had been hindering live music. Indeed in its submission to the REF review of research in 2014 my then employer, the University of Glasgow, claimed that my research as part of LMX had 'in-

¹² See <http://www.livemusicforum.co.uk/text/hbulletin310.htm>

formed policy changes', a rather modest, but legitimate claim.¹³ LMX also featured as part of the University of Edinburgh's submission¹⁴ where its work in influencing thinking within the industries and its political connections were highlighted.

One key policy lesson here was that there was a need for independent research in a complex policy area. Our strength was our *impartiality*. While we were obviously pro live music, we were also independent of the industry and not aligned to it. We endeavoured to speak for the citizen, rather than for any of the vested interests. Another lesson was that we also had good contacts with campaigners and the key politician working in the area, so some long-term work paid off. Finally, we were part of a broad campaign and that was a key to the passing of the Act. Thus, the main lessons from LMX are those of impartiality, building long term relationships and being part of wider campaigns.

5 Project 4: Cultural Value at the Queen's Hall (2013)

One purpose of LMX was to develop and enable further bids for funding. By 2013 another colleague, Adam Behr, had joined as a researcher and was developing - and included in - various bids for funding. Meanwhile the AHRC, had become concerned with questions of cultural value which became something of a policy preoccupation for a while as it had become widely felt that the creative industries were too often conceived of simply in terms of their economic value.¹⁵ Within a prevailing neoliberal orthodoxy questions of whether art could be simply art's sake or produced for a market became debated again. If it *was* possible to have art's for art's sake, then questions remained about how express its *value* in non-economic terms. In response to such issues the AHRC devised a programme, which aimed to *"establish a framework that will advance the way in which we talk about the value of cultural engagement and the methods by which we evaluate that value ..., beginning with an examina-*

¹³ See [https://results.ref.ac.uk/\(S\(ttu0nhffu3o1vkk14wxldmzs\)\)/Submissions/Impact/588](https://results.ref.ac.uk/(S(ttu0nhffu3o1vkk14wxldmzs))/Submissions/Impact/588)

¹⁴ See [https://results.ref.ac.uk/\(S\(ttu0nhffu3o1vkk14wxldmzs\)\)/Submissions/Impact/978](https://results.ref.ac.uk/(S(ttu0nhffu3o1vkk14wxldmzs))/Submissions/Impact/978)

¹⁵ See Warwick Commission 2015

tion of the cultural experience itself and its impact on individuals and benefit to society" (cited Behr et al. 2014a: 407).

LMX successfully applied for funding for two research projects within this programme. The first involved working with a particular venue in Edinburgh, the Queen's Hall. This former church is a 900 capacity venue which is run as a charitable trust with a board of governors.¹⁶ It hosts around 200 shows a year across a range of genres. While it puts on some of its own shows, it is primarily a venue for hire and thus needs to attract external promoters. This entails working with different types of people and organisations with different motivations for putting on shows.

As part of our work on live music we had developed models of promotional practice and were keen to do see how different promotional practices affected the audience's experience. In particular, we wanted to determine whether the type of person or organisation putting on a show affected how audiences *valued* their live music experience. In order to examine this, we looked at three different types of promoter – which we termed amateur/enthusiast, state-funded and commercial – and the different promotional practices they used. This involved looking closely at six different events at the Queen's Hall between September and December 2013 and getting audience members to keep diaries of what they thought about the gig, both before and after.

Our research covered a reasonable range of genres as the acts included Scottish folk stars Phil Cunningham and Aly Bain, the Scottish National Jazz Orchestra with Branford Marsalis, two concerts by the resident Scottish Chamber Orchestra, singer songwriter Heidi Talbot and cult indie band They Might Be Giants. Detailing all our findings lies beyond the scope of this article,¹⁷ but they included the fact that, in contradistinction to some stereotypes, people tend to enjoy live music for similar reasons across different genres. In particular, regardless of genre, people go to live music events to break out of their daily routines and to enter into another world that is to have a transcendent experience.

¹⁶ See www.thequeenshall.net/

¹⁷ For more see Behr et al. 2014

We also found various types of value and of competing values. One was intimacy versus spectacle. The Queen's Hall was valued for its intimacy, but obviously cannot host bigger shows and so can only stage particular artists.¹⁸ Some people valued the unique atmosphere of the venue, with the age of the building adding to its gravitas. But others found the building's shape –as a former church - inconvenient. Some audience members valued surprise and the unexpected, while others valued confirmation of already held tastes.

Across the board people spoke of the value of becoming immersed in the event, although there were divisions about whether such immersion was better as inward or mental, or physical in the case of dancing. In fact, dancing could be the site of contestation with one respondent saying that they left a gig because others were dancing. But in all cases live music was valued for its *potentially* transcendent effect. Interestingly, few of our respondents put an economic value on this. Once an initial decision had been made to buy a ticket, value for money didn't really enter the equation. So, people might think that paying £20 for a ticket is a bargain or too much when they are considering buying, but after attending few would express the value of the gig in financial terms.

The main policy issues to emerge here were for the venue itself. The research provided some audience quotes which could be used in publicity. In addition, our findings were also potentially helpful for the venue when it was negotiating funding with benefactors such as the City Council and Creative Scotland (the successor to the Scottish Arts Council). We thus helped the venue articulate value to potential funders. We also had academic input here as we suggested In order to work with the venue in an informed way, the City Council needed to understand the venue's role within the wider live music ecology of Edinburgh. This was a key point, that venues cannot be judged in isolation, but as part of a wider music ecology, key to which is a sense of interdependency.¹⁹ One aspect

¹⁸ The venue's website currently proclaims it to be "intimate, memorable, unique" - www.thequeenshall.net/

¹⁹ For more see Brenan and Webster 2011, Behr et al. 2014a, 2014b and <http://livemusicexchange.org/blog/the-ecology-of-live-music-the-evolution-of-an-idea-live-music-exchange-editorial-team/>

of this is that if a venue closes, then other people - audiences, musicians, promoters, other venues, local businesses etc. - also suffer.

We also noted that the research we did could influence the Queen's Hall's relationship with Creative Scotland. As a result of research on the state of the Scottish music industries which this body had commissioned (EKOS 2014), it was considering supporting the building of a new 500 capacity venue in Edinburgh in order to fill a gap in provision which the report had identified. Our research suggested that while this might be a good idea, the effect on existing venues had to be taken into account. So again, we stressed the idea of ecology.

We also noted that the Hall had been unsuccessful in some applications for UK wide national lottery funding and so its future was bound up with policies pertaining elsewhere.

Above all we suggested that the transcendence which audience members routinely spoke of doesn't necessarily have a market value and that engaging with art is something which makes us human. Any policy which did not recognize this, we suggested, was doomed to failure. So art is not for art's sake but humanity's – and this has policy implications.

6 Cultural Value 2: From the pub to the stadium (2014)

Between March and June 2014, we ran another cultural value project called *From the pub to the stadium: Getting behind the numbers* (Behr et al. 2014b). While the previous project had concentrated on one venue, this one was about localities. As live music has to happen somewhere, in terms of towns and cities, there are questions about how that somewhere affects the provision of live music within the jurisdiction. Thus, it is possible to ask why live music provision within any given location is the way it is. While much previous work on live music had concentrated on the figures,²⁰ we again wanted to get behind that and look at cultural value, this time by looking at the lived reality of those working in live music on a daily basis or - in our words – *"to provide an account of the*

²⁰ See, for example, UK (2017b)

broader value of live music, the range of ways in which it is expressed and the variety of people who produce it" (Behr et al. 2014b: 1).

We focused on three locations – Camden, Glasgow and Leeds. In each place we spoke to venue operators and then provided both overviews of the cities and case studies of three venues, covering a range of venue sizes – i.e. from the pub to the stadium. We tried to speak to a broad range of venues and to key policymakers in each city, as well as industry bodies such as the Musicians' Union and PRS for Music, the songwriters' organization, which collects fees for the use of its members' music in live performances and so monitors the UK's venues. In sum we wanted to get beyond the numbers and look at the reality of running a venue.

This time the bigger context was that as the value of live music continued to exceed that of recorded music there was talk in the press of a boom in live music,²¹ whereas we our own experience as musicians, fans and activists suggested that things were not so rosy at the lower end. Once again, a key idea here was the notion of a live music ecology – *"whereby different venues – of all sizes – display interdependence, alongside different promotional practices"* (ibid: 3). We wanted to examine various issues including: What all venues have in common; the relationships between the public and private sectors and how venues interacted to produce value for both audiences and artists.

Our main findings were that:

- the weakest point of the live music ecology at present is the small to medium independent venues;
- policymakers need to pay more heed to the economic and cultural contribution of smaller venues as local political regimes often focus their attention on major developments whose key beneficiaries are larger businesses. For example, local policy makers favour big new projects rather than

²¹ See, for example, Grenburg 2013

helping small existing ones. The public funding of the SSE Hydro in Glasgow and Leeds Arena provide examples of this;

- greater harmonisation of regulatory regimes and their implementation across the UK will benefit independent and major operators alike;
- there was a need for a more "joined up" approach across council services is widely acknowledged but not always fully implemented.

For example, we noted that cultural policy within a local authority might conflict with planning policy in the same jurisdiction (Behr et al. 2014b).

We also noted that competition between cities can drive investment in infrastructural projects, but also that one of the side effects of such regeneration can be a more difficult environment for venues without the commercial or political wherewithal to adapt quickly to processes of "gentrification". For example, some people move to a place because it is "cool" and has a lot of cultural activity, but then complain about - and try to close - a noisy local venue, which others think is cool and which is part of the local music ecology. In countries such as Australia and the UK this has led to the adoption of regulatory regimes of the Agent of Change principle which stipulates that where there is a dispute about the sound emanating from a venue, then it is the agent of change who is responsible. Thus, if a new venue opens next to existing premises, then they are responsible for the sound, but if someone moves in next to an existing, then they are the agent of change and so have to take responsibility for remedying any noise problems.²²

We found that while it is often the smaller venues which experience problems with noise complaints from newly arrived neighbours, but it is such spaces that provide both performance and socialising opportunities for emergent acts. Such venues feed into an area's 'local character' – its

²² For more see <http://musicvenue trust.com/2014/09/what-is-agent-of-change-and-why-is-it-important/>

musical history and reputation – in a way that makes them difficult to replace. Overall, our report suggested, the main point here was that any policy for live music had to discover the lived reality of the people working in the industry, to recognise the great diversity of music venues and, once again, to see live music as an interdependent *ecology* (ibid: 10). We have explored the latter notion in other places (Behr et al. 2016) and it has been picked up in other places including in New York (Creative Footprint 2018).

Meanwhile this project had benefitted from the support of three important partners within the music industries who wrote letters of support for the project and provided personnel for the advisory board. These were UK Music, the representative and lobbying body for the commercial sector; PRS for Music, which, as noted earlier, is the songwriters' association and gathers fees for the public performance of its members' songs and the Musicians' Union, which represents performers. Such support did not appear overnight and was the result of years of building up working relationships with key people in the UK's music industries and overcoming mistrust of academic research. The seeds of that mistrust can be seen as being in the debates around the campaign to extend the period for which sound recordings remained in copyright. This is another complex story but in short, the record industry and rights organisations were campaigning for the period during which recordings stay in copyright to be extended and many academics were campaigning against it. The business won and in 2011, the term was extended from 50 to 70 years. But the battle had been quite vicious and included generally dismissing academic work.²³ However, as part of our work to develop a Music Manifesto for Scotland (Cloonan & Frith 2011) Simon Frith and I had consulted various music industries personnel across the UK and held joint meetings with them under Chatham House rules. So the lines of communication were still open, something which was to help with the next project.

²³ See Williamson et al. 2011

7 Project 6: The UK live Music Census (2016-18)

By 2014 we had industry support in the UK and were also getting international interest in our work. In particular Australia was the forefront of a number of issues concerning live music and a number of links developed there. For example, I first come across the agent of change principle there (Cloonan 2007, 2008). We had also been very impressed by a census which took place in Melbourne in 2012 which tried to assess the value of live music in the city (Music Victoria/City of Melbourne 2012). As so often is the case this came in response to a crisis – this time around rules for security at gigs and a massive campaign to save live music in the city.²⁴

Meanwhile in Edinburgh there were concerns that too many venues were being closing and that it was too easy for residents to make complaints that led to venue closure. Once again, there was a need to find out the real situation. So my colleagues in Edinburgh, Adam, Matt and Emma, did a census of Edinburgh's live music scene in 2015, essentially refining the work done in Melbourne (Behr et al. 2015). The results of this were published and eventually played a part in Edinburgh liberalising its regulations around noise emanating from venues (Behr 2017).

Emboldened by this we decided to role the model out to the UK. Again, we wanted to get the reality and to think through the policy implications, this time on a UK basis. So we applied to the AHRC for funding to undertake the UK's first nationwide live music census. This was to be a mixture of online surveys of musicians, venues, promoters and fans, combined with snapshot censuses carried out over a 24 hour period in our three case study cities of Glasgow, Newcastle and Oxford. In these cities on 9 March 2017 we sought to go to every public live music event in the city in a 24-hour period. We trained volunteers and sent them to venues to get as much information as we could on the event – attendance and demographics, admission price, performers etc.

Our main findings were that live music has significant economic and cultural value that smaller venues are a vital part of the live music eco-

²⁴ See Homan et al. 2015

gy, and that despite all this live music is also facing a number of problems – particularly at the smaller end. While none of this came as a big surprise to us, we now had confirmation of long held hunches. We also brought a great deal of media attention to the plight of live music²⁵ at a time when there was growing concern about a decline in the number of venues in the UK.²⁶

Research methodology had been a key concern in the designing of the research. Following reading various reports from within the music industries, I noted that the methodology was often less than transparent.²⁷ It seemed that some people within the music industries were somewhat indifferent to questions of methodology, simply wanting the right results. However, as academics we know that "rubbish in = rubbish out" and so we *cannot* be indifferent to methodology. In the process of designing the Census we had to convince the industries' people to take an interest in our methodology. We also began to think of developing a method which anyone could use to conduct a census in their town and which had the support of the industries. So we consulted our partners - here UK Music, the Musicians' Union and the Music Venues Trust (MVT, which represents grassroots venues) - and other stakeholders in a series of meetings and got their agreement to our methodology. We then produced a toolkit based on that methodology which is now freely available on the project website for use by any person or organisation interested in assessing the value of live music in a given place.²⁸ The development of the toolkit and its endorsement from leading industry organisations again built on long term relationships. This suggested that a key lesson is to nurture relationships over the long term - and then be prepared to seize the moment.

The report contained several policy recommendations for the various levels of UK government: local, the devolved "national" governments in Scotland, Wales and Northern Ireland and the UK government.

²⁵ See <http://uklivemusiccensus.org/>

²⁶ See, for example, Greater London Authority (2015) The formation of the Music Venue Trust (www.musicvenuetrust.com) was one response to this perceived crisis.

²⁷ See Cloonan 2007 for some examples

²⁸ The toolkit is available via <http://uklivemusiccensus.org/>

These included pushing forward the agent of change principle and taking action on the secondary market for concert tickets. Having made these recommendations, we rather withdrew from the fray, as we felt it was up to others to use our evidence in their own lobbying and campaigns. As academics we need to be wary of lobbying ourselves but can provide evidence for other lobbyists to pick up and we can encourage them to do so (as we had done in the campaign to reform the 2003 Licensing Act).

Meanwhile the partners who had previously supported our work proved to be more problematic this time. As noted, one partner was UK Music, the industries' lobbying and representative group. It runs what it calls a Music Academic Partnerships wherein universities pay £10,000 a year for access to industry people.²⁹ The MAP scheme currently has 17 members and when we approached UK Music to support the Census, they suggested that they would only do this if we involved some of the MAP members in the work. So one of our partners made working with *their* partners a precondition of remaining a partner. We eventually agreed to this and some MAP partners undertook their own censuses using our methodology, with some of their findings wrapped in to the final report. But the involvement of MAP partners compromised our independence, suggesting that one problem with building long term relationships is that partners might suddenly change the rules and that can have big policy implications.

The second issue was reporting the findings. In terms of outputs, in addition to the toolkit designed with the partners, the main public document we committed to was to be "*a report outlining best practice for policy makers, industry personnel, musicians and venues in engaging with one another to sustain live music provision*" (Brennan et al. 2015). But when writing report up we found that we had far too material so it was agreed internally that we would now produce two things - a *full* report which would only be online and an executive summary, for the partners and stakeholders, which we would make available at the report's launch and which was the sort of output we had originally envis-

²⁹ See <https://www.ukmusic.org/skills-academy/music-academic-partnership/>

aged. However, when we made the draft Executive Summary and full report available to our partners some problems emerged. Both the Musicians Union and the MVT objected to one particular finding being in the Executive Summary. This concerned the fact that: *"48% of all respondents to the venue survey, 60% of those identifying as small music venues and 68% of those identifying as bars/pubs said that the cost of paying bands had a negative impact"* (Webster et al. 2018: 63).

Here the MU seemed concerned about giving the impression that employing musicians was too costly, while the MVT seemed to want to avoid the idea that venues are mean. So these two partners lobbied for us to exclude that finding from the Executive Summary. Ultimately the messy compromise was that the finding stayed in the full report but was not, one of the bullet points in the Executive Summary. Here the MU and MVT's *private* interests – in protecting the images of their members – came into conflict with the *public* interest, which I have argued elsewhere that academics should protect (Williamson et al. 2011).

But partnership with industry is a key part of the educational landscape in terms of impact. Here the AHRC is clear that partnerships can play a key role in determining whether a grant application gets funding: *"we want to encourage applicants to consider, in ways that are appropriate given the nature of the research they are proposing to conduct, potential pathways to impact, for example through engagement or collaboration with partners, and to help the research councils support them in these activities"*.³⁰ Applicants have to submit Pathways to Impact statements as part of the application process, with the application form including a space for partners to be listed. The AHRC is explicit that: *"Hopefully, it will also encourage (applicants) to make new connections and partnerships with relevant organisations"* (ibid.). It is also explained that: *"The impact sections are intended to allow applicants to highlight, as appropriate for their research, potential pathways to impact, for example through collaboration with partners, and to help the Research Councils support them in these activities"* (ibid., emphasis Cloonan).

³⁰ See (<http://ahrc.ukri.org/documents/faq/impact-summary-and-pathways-to-impact-frequently-asked-questions-ahrc/>, emphasis Cloonan)

Thus impact plans are a key criterion in the assessment of funding applications and one key way to produce impact is to involve partners. Our bid had stated that it was "*founded on principles of impact and knowledge exchange*" (Brennan et al. 2015) and we spoke of the Census being "*designed to facilitate knowledge exchange with the music industries*" (ibid.). We could evidence the likelihood of this happening as we had worked with music industries bodies on previous research and were able to say that the Census would be "*a collaboration between music industry organisations ... and leading academic live music researchers*" (ibid.). The problem for academics comes when partners disagree with or want to play down findings and the lesson is that academics need to know in advance what their response to such situations will be. Unfortunately, we had not done this. But hindsight is always a wonderful thing and something which informs the next section.

8 Conclusion

In order to draw some conclusions, it is necessary to return to the wider academic, industrial and political context. Within this the impact agenda is likely to remain a key consideration in applications for research funding, including research on the music industries. While this is something of a mixed blessing, it cannot be ignored as impact statements increasingly form part of application processes. Based on my experiences, the good news here - and perhaps the headline figure - is that *policy makers do value academic research*. This means that academics *can* influence music (and other) policy. However, the caveat is that that value depends on myriad contextual factors. In particular my experience suggests that independently-minded academic research is often called for in times of crisis/disruption. The Scottish Enterprise research was commissioned because that organisation was being criticised and needed to do be seen to be doing something. So it commissioned some experts to tell it what to do. While our advice was largely ignored, the Scottish report ultimately led to the Live Music History project, because Simon Frith and I had spotted a gap in the market - a neglected research topic - and then be-

came the experts in it. In the longer term that was to lead us back into policy.

Meanwhile the LMX project live music research was picked up by campaigners and used by a senior politician in a context where it was becoming apparent in high political circles that the 2003 Licensing Act and this was causing considerable problems. The sole point of the AHRC's cultural value programme was to address criticisms that the value of culture was too often seen in economic terms and the projects we undertook were part of a bigger programme designed to find different ways to talk about value. Finally, the UK Live Music Census was an important and unique piece of work, which took place at a time of perceived crisis in venues. It also illustrated potential tensions, raising questions about how far academics should go to keep partners happy, especially if we want their support for other projects in the future – something which they need in these times of impact statements. Overall the evidence suggests that in times of crisis independent, non-aligned, research can help to inform policy.

It is also apparent that academic research into the music industries can be useful for lobbying and campaigning purposes, but also that this should not involve advocacy on behalf of the industry. This is precisely because the key value of academic research is that of its impartiality. Thus it is important not to do advocacy work as that undermines the very thing which sometimes makes academic research valuable – its non-aligned nature. In the projects in which I've been involved even if music industries people dismissed the work, they could not accuse us of partiality. We were not in anybody's pocket – not even those of our funders.

Many of the benefits, which I have accrued while researching live music have come via the development of long-term relationships. These are essential but can also be vulnerable if there are disagreements about how to present research findings and even more so if the disagreement is over *what* to present. However, it should again be noted that even if policy-based research from academics does not directly lead to changes of policy, it can increase the broader understanding of the relevant in-

dustries. In my case the development of notions of the music industries plural (Williamson & Cloonan 2007) and of a live music ecology (Behr et al. 2016) are ideas which have gone on to have wider currency and both were the results of thinking which emerged from policy based research.

I have also problematised the notion of impact as it applies to the music industries (Williamson et al. 2011) and this article is a further contribution to that problematisation. In all our academic endeavours, we hope to make a difference. The evidence gathered here suggests that that is best achieved as part of collective actions and of collaborations of the sort that those assessing impact do not always recognise. This may be a battle for the future, and it is hoped that the lessons suggested here can help to equip colleagues involved in such battles.

9 References

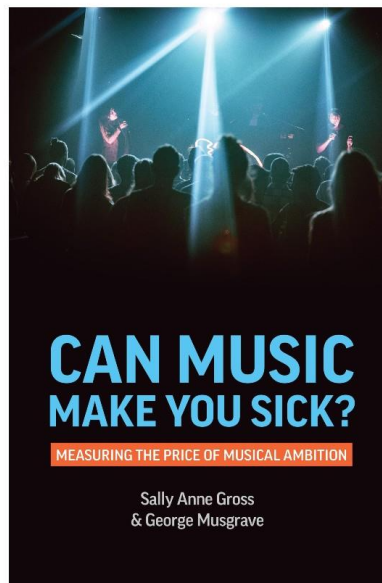
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Can Music Make You Sick? Measuring the price of musical ambition by Sally A. Gross & George Musgrave, Westminster University Press, London, ISBN 978-1-912656-64-6 (paperback)



Book review by Daniel Nordgård

This is a much-anticipated book, building on years of work and rich data – quantitative as well as qualitative. The book builds on, or continues the works from 2016 and 2017 after the two authors were commissioned by Help Musicians UK to write a two-part report entitled "Can music make you sick?" The two initial reports build on a large survey among British musicians and artists (2016) and a series of in-depth interviews (2017). While the two reports have circulated and become reference points for many (myself included), the book provides new and richer narratives that adds to the previous reports.

The book poses the rhetoric (and to some perhaps provocative) question; Can music make you sick? The answer to the question is provided early in the book, already in the introductory chapter by referring back to the surveys that their previous two reports built on, as an unequivocal *yes*. Music *can* make you sick! And from the very start, the book flags the tone of the topics being addressed. These are serious issues, issues of suffer and struggle, and even of life and death. Albeit carefully avoiding reducing the topic to a select few celebrities' tragic deaths, the introduction opens by pointing to the many high-profile deaths we've witnessed these last couple of years. If nothing else, then to remind us that the topic has been evident and in plain sight for a long time. It's not been hiding. And the book provides a compelling and well-grounded structure to discuss these difficult issues.

Throughout the introductory chapter, three main objectives are presented. First of all, it aims *"to provide an empirical understanding of how contemporary musical artists and professional musicians experience the aspiration to build a musical career, and how these musicians feel about their emotional wellbeing and mental health"*. Secondly, it aims *"to understand contemporary conditions for creativity and their impacts on musicians and their mental wellbeing"*. Thirdly, the book aims at understanding how the two former conditions *"relates to education and (professional) training"*, embedded in their own experiences as teachers, researchers and academics.

The book provides six chapters whereby the first two provides a framework for the next three. In both first chapters a bridge is built to the survey and the quantitative analysis presented in their previous report (2016) as well as providing a theoretical backdrop for the book and its analyses. A central theme here, which is being discussed throughout the book, is how music and musical work is understood in relations to digitalization. They critically discuss how musicians and music is being affected by abundance – an abundance of culture, of content and creators. And by referring to David Bowie's much cited statement that in the future, music would become like running water, or electricity, they make clear that in an era of unlimited access (for artists and fans) music and

musicianship risks becoming abundant and mundane. And that this in turn may have significant impact on artists and musicians and their aspirations and conditions for building musical careers. The book takes a critical position towards narratives of digitalization, neatly articulated in the beginning of chapter 4, where the authors establish that their *"view is that contemporary ideas of artistic empowerment in the digital age are dangerous, as they reinforce an idea of individualized entrepreneurial control which is largely illusory"*.

While the two first chapters are interesting, adding to an already established field of critical debate on the effects from digitalization, it's the next three chapters that really provides new and interesting insights. Here they work more thoroughly and in depth with the interviews initially reported on in 2017. The book-format allows the authors to work with the topics in more detail and by constructing themes for the reader to better understand the analyses the two authors provide. The three chapters are organized as three distinctive angles, illuminating and discussing *the status of work* (ch. 3), *the status of value* (ch. 4) and *the status of relationships* (ch. 5). Throughout these three chapters, narratives are told, drawing on a wealth of data from the 28 in-depth interviews and using excerpts to highlight or exemplify important issues. These could be the workload for an artist trying to create music as well as a brand and a business (3.1), the vulnerability of depending on an online feedback culture (4.1.1), or on luck (4.2.3). Or the challenges with balancing family and social life with aspirations for a musical career (5.1). The three chapters displays a broad and unsettling list of issues that might help explain the initial findings in their 2016 survey – that a disproportionately large part of the respondents say that they've experienced anxiety and depression.

In the sixth and last chapter, they conclude by addressing what their findings must lead to, with regards to public, political and academic debates. Already, they state, progress is happening, simply by the issue being addressed and more initiatives on mental health appearing over the last couple of years (6.3). But, perhaps even more important, what do these findings mean for music education (6.4) and the role and re-

sponsibility educational institutions? No doubt, as a teacher myself, at a master's program for music business and management, these questions followed me while reading this book. And although the authors don't provide the answers, they nonetheless manage to pose some critically important questions.

This is an important book and a timely one. Sadly, the issues being addressed seem more important than ever, with Covid-19 and the impacts the pandemic has had on this particular sector. As the two authors also notes, the data is collected prior to the Covid-19 outbreak, but this will no doubt have a significant impact on the sector, making matters worse. Hopefully, the current crisis may help put further focus on the issues being addressed in this book and in the longer run, perhaps initiate change that might help future musicians and artists not being sick.

Notes for contributors

Submission of papers

All submissions should be made by e-mail to music.business.research@gmail.com.

Authors should prepare and send an anonymous version of her/his paper for double-blind-reviewing. A brief biographical note about each author should be supplied in a separate file. Details should be given of authors full postal and e-mail addresses as well as telephone and fax numbers.

Submission should be in English, typed in double spacing (including all notes as footnotes, references, tables, figures and plates). English or American spelling is acceptable provided usage is consistent.

Submission of a paper to the journal will be taken to imply that it presents original, unpublished, work not under consideration for publication elsewhere.

An abstract of the paper, of up to 500 characters (including spacing), should accompany the article. In addition, a list of between three and six key words, suitable for indexing and abstracting services, should be supplied.

Articles should not normally exceed 7,000 words (without references) in length. If your word-processor is capable of doing a word count please use it to print this at the end of the text, together with the date of the manuscript.

Notes should be kept to a minimum and placed as footnotes at the end of the page.

References

The Harvard reference system is used in this journal: the name of the author, the date of publication and, following quoted material, the page reference, as a key to the full bibliographic details set out in the list of references, e.g. "... citation ..." (Peterson 1990: 56); several authors have noted this trend (Smith 1970; Jones & Cook 1968; Dobbs et al. 1973). (N.B. et al. to be used when there are four or more authors.) The date of publication cited must be the date of the source referred to; when using a republished book, a translation or a modern version of an older edition, however, the date of the original publication may also be given. Where there are two or more works by one author in the same year, these should be distinguished by using 2012a, 2012b, etc. The reference list

should include every work cited in the text. Please ensure that dates, spelling and titles used in the text are consistent with those listed in the References. The content and form of the reference list should conform to the following examples. Please note that page numbers are required for articles, both place of publication and name of publisher should be given for books and, where relevant, translator and date of first publication should be noted. Do not use et al. in the reference list; use surname and initials for each author.

Book volume:

Allen, P., Macy, A. & Hutchinson, T. (2010) *Record Label Marketing*, Focal Press, Amsterdam and Oxford.

Article in edited volume:

Burnett, R. (1996) "The Popular Music Industry in Transition", in *Mass Media & Society*, eds A. Wells & E. Hakanen, JAI Press, London, pp. 120-140.

Article in journal:

Oberholzer-Gee, F. & Strumpf, K. (2007) "The Effect of File Sharing on Record Sales: An Empirical Analysis", *Journal of Political Economy*, vol. 115, no. 1, pp. 1-42.

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Unpublished:

Holland Mortimer, J., Nosko, C. & Sorensen, A. (2010) *Supply Responses to Digital Distribution: Recorded Music and Live Performances*, NBER Working Papers 16507, Harvard Business School.

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