

RESEARCH ARTICLE

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Music festivals in small and medium-sized Spanish cities: between place dependency and spatial unboundedness, ongoing festivalization and processes of financialization

Carmen Vázquez-Varela^{1*} , Diego A. Barrado-Timón² and José M. Martínez-Navarro¹

Abstract

The approach to festivalization concerns a tendency in present-day, western societies to arrange cultural production in a festival-like way. This marks a shift that some scholars argue is a societal phenomenon intertwined with changing consumer habits, social practices, emergent markets, creative city promotion policies and developing government policies. The focus on festivalization as an analytic tool for describing a process of adapting music and musical behaviours to the festival format is already well established in academia. Recently researchers and stakeholders started to witness with serious concern the concentration process in the European live music sector led by major groups own stakes in several key steps of the music value chain, such as artist management, ticketing and live distribution (venues and festivals), hampering the competitiveness of small and independent festivals. The innovation of our present contribution lies in our proposal to approach the processes of festivalization as undergone by small and medium-sized cities in Spain, which are both complex and diverse in terms of territorial reality. At the same time, we intend to identify processes of financialization that lead to extractivist models for the music festival, far from those that favour situated cultural and/or productive engagement, as well as from the emergence of festivals that have proven to be fertile for the territories that host them. After an extensive literature review, we have approached the research on the basis of a time-frame from the creation of the first musical festival (1939) that remained active until 2019. We conducted an exhaustive scrutiny of secondary statistical sources as well as specialised yearbooks and websites of the sample of cities and festivals. A database has been built with all this information, which brings together 402 festivals by urban location, date of establishment, number of editions held, musical style, organizing institution, etc. With all this information, an analysis has been carried out using descriptive statistics, tables and cartography. While the initial time-frame was designed to analyze the growth and spread of the different music festivals and their characteristics connected with the process of festivalization, a second and more limited time-frame of 2000–2023 has focused on analysis of the processes of financialization observed in the field. For this purpose, we have carried out exhaustive monitoring of the merger-and-acquisition processes involving foreign investment funds and large multinationals through the sector's yearbooks and the specialized media. The data and evidence gathered in this contribution show that many small and medium-sized cities consider music festivals to be a valuable asset to culture-led urban policies, both in the pursuit of urban regeneration/local development goals and in their repositioning and diversification as tourist destinations. We have witnessed the unprecedented evolution in the number of festivals

*Correspondence:

Carmen Vázquez-Varela
carmen.vazquez@uclm.es

Full list of author information is available at the end of the article



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over the past three decades; the spread of festivals throughout the urban network, especially in its Mediterranean coast and in metropolitan area settings. The interrelationship between territory and institutionality leads to the identification of two extreme festival types: situated cultural initiatives and practices (festivals with roots and anchorage in a specific locality) and spatially unbounded festivals (without any commitment to the territory and showing extractive behaviour). The former type is mostly dominated by classical, flamenco, jazz/blues, and traditional/world music festivals, while the latter consists almost exclusively of pop/rock and urban multi-style festivals. The high profitability of many of these festivals explains why foreign investment funds have turned their eyes in this direction in recent years.

Keywords Music festivals, Small and medium-sized cities, Festivalization, Financialization, Music style, Live music industry

Introduction

The iconic status achieved by music festivals through the 1960s and beyond has led to the excessive commodification of such gatherings (Chaney 2019). Further, it must be acknowledged that festivals engender many externalities (Getz 2005). From the economic point of view, festivals are not simply a short-term source of income for the local economy and vehicle for job creation; they also contribute to the long-term stimulation of tourism activity for their host city or region, thus serving to boost its image. From a cultural point of view, it is argued that festivals contribute (or should contribute) to creating an artistic dynamic within each region or city. From a social point of view, festivals are attributed the capacity to foster community cohesion around a common event. Organizers, volunteers, and attendees (known as “festival-goers”) coalesce around a collective project and together live a unique experience that unites them.

Nowadays, nearly every region, city, and neighborhood host its own festival, prompting some experts to refer to this trend as ‘festivalization’. Ronström asserts that there are multiple interconnected ways to comprehend and approach festivalization as a real-world phenomenon. He discusses four facets: (1) the semantic field of events; (2) festivalization and music life; (3) festivalization as a form of mediaization; and (4) festivalization as a defining trend in society at large (Ronström, 2014). The first concerns a current trend of rebranding as festivals all kinds of traditional forms of gathering, celebration, and festivity. Over the span of two decades, this widespread “festivalization of events” has transformed the term ‘festival’ into a broad, all-encompassing label that can be applied freely. The second facet involves the expansion of festivals worldwide in terms of time, space, and content, in a trend that has been termed the “festivalization of festivals” (Jæger et al. 2012). The third facet addresses the impact of adapting repertoires and performances to fit the festival format. The fourth facet or approach to festivalization concerns a tendency in present-day Western societies to

arrange cultural production in a festival-like way (e.g. the concentration of multiple artists into one place, singular staging, gigantism). The most blatant example is probably that of pop-rock festivals, where the complex dynamics of festivalization have commodified and trivialized their transformative power.

In this context, mega-festivals have emerged as a specific research sub-theme that arouses both fascination and controversy. Salient aspects include their link to a powerful and increasingly financialized music industry, their configuration (often as epitomes of hyper-consumerism), the homogenization of supply, and the progressive inequality observed among the artists who participate in festival line-ups—not to mention the precarious working conditions of many who make them possible. All this helps to explain why Ramón Marrades, Chair of *Placemaking Europe*, claimed in 2021 that such festivals were “isolated, polluting machines, maximising consumption inside them, and dreadful for the reality they claim to benefit” (López 2023). Speaking of Spain in particular, Nando Cruz argued in 2023 that “we are facing the third war between music festivals, now between international companies” (Vendrell 2023).

Be that as it may, music, and more specifically music festivals, (whose progression, capacity for growth, and transformation far exceed those of other sectors of the cultural economy) has been revealed as a compelling and promising field for research. If we consider the diverse traditions and approaches employed in research on music festivals across different contexts, we can identify three broad categories or sets of contributions that explore the wide repertoire of functions played by these cultural encounters: the approach from cultural management (Klaic 2014); contributions from the cultural and experience economy (Sundbo 2004; Bracalente et al. 2011; Lorentzen 2013; Pulh 2022) and those focused on the study of events, with a clear bias toward tourism studies; and research traditions that seek to unravel the complex relationships between

festivals and the territories that produce and/or host them (Faire d'Arcier 2014; Van Aalst and Van Melik 2012; Leenders et al. 2015; Alonso-Vázquez et al. 2019; Lynch and Quinn 2022).

Based on the context described above and academic production that has favoured case studies or papers on metropolitan contexts, the innovation of our present contribution lies in our proposal to approach the processes of *festivalization* as undergone by small and medium-sized cities in Spain, which are both complex and diverse in terms of territorial reality. At the same time, we intend to identify processes of *financialization* that lead to extractivist models for the music festival, far from those that favour situated cultural and/or productive engagement, as well as from the emergence of festivals that have proven to be fertile for the territories that host them.

In summary, we could say that this paper is structured according to the following research questions: Drawing on the processes of festivalization identified in the literature and mostly documented in large cities and metropolitan contexts, we wonder whether we can speak of dynamics of festivalization for medium-sized Spanish cities as a whole regarding music festivals. If yes, what was the timeline of their establishment and development? Can location spatial patterns and city profiles be distinguished, what is the role of territory?

Furthermore, and concerning the processes of financialization that impact on live music, and more specifically on festivals, have they hit all music festivals equally or have they focused on those with specific artistic projects and particular types of cities? What is the role of the institutions involved in the organisation of the festival?

A brief approach to concepts, processes, and research issues concerning music festivals, festivalization and financialization dynamics

On the concept of 'festival'...

One question worth addressing before we proceed with a detailed analysis of the state of the art of research on festivals (and more specifically music festivals) is the very definition of the term.

As Waldemar Cudny rightly notes, there are many definitions of 'festival', formulated at different times and from distinct scientific disciplines, because researchers approach the phenomenon of festivals in a variety of ways (Cudny 2014a). Most academics agree that the earliest scientific analyses were conducted as part of the sociological and anthropological studies undertaken in the late 19th and early twentieth centuries. Since the 1980s, however, festivals have often been treated as a type of event, moving analysis into the realm of event studies (Getz 2005). In accord with one relevant scientific

definition of festivals, these constitute a ritualized break from routine that underscores certain values within an atmosphere of joyous fellowship (Horne 1989). Indeed, festivals also play a significant role in creating a sense of belonging and pride among local residents, thereby fostering the sharing of local resources and encouraging local purchases (Julien 2007). Furthermore, festivals are highly dependent on the driving forces of key individuals acting within networks who support their emergence and occurrence on a regular basis (Gursoy et al. 2004).

Today the word 'festival' is used in various languages to designate a wide array of celebrations, alongside numerous equivalent concepts that point in the same direction: celebration and the suspension of ordinary life, with focus on expressive forms such as food, drink, special clothes, drama, music, and dance, often with a distinct spiritual component (Ronström 2016). Sometimes they are further associated with a clear economic-touristic purpose; in this sense, Uysal and Gitleson (1994) define festivals as traditional events with the purpose of enhancing the tourism appeal of a location. By showcasing local culture, traditions, and unique experiences, festivals attract potential visitors, thereby contributing to the economic development and cultural vibrancy of the host area. Thus, do festivals enhance their communities' economies and landscapes, but their success often depends on whether volunteers can be encouraged to dedicate time to these events (Getz and Frisby 1988; Gursoy et al. 2004).

The scholars involved in the 'Euro-Festival Project' (<https://cordis.europa.eu/project/id/215747>), embedded in the contributions to comparative cultural sociology of contemporary European society, provide the following definition: "A festival is the manifestation through which a society or group makes plain its consciousness of its own identity and its determination to preserve its identity" (Friedrich 2000; Segal and Giorgi 2009). Elsewhere, other scholars from the field of geography indicate that all festivals share certain features (Cudny et al. 2012): (1) They are diverse and uncommon events that stand apart from the routine of daily work life; (2) they celebrate elements that hold significant meaning for a particular community, thereby reinforcing communal bonds; (3) they often have strong ties to the culture and religion of local communities, reflecting their traditions and beliefs; (4) they frequently encompass a wide array of social and cultural activities, offering something for everyone; (5) they are generally closely linked with art and culture, showcasing various forms of artistic expression; (6) they are regular events; occurring at set intervals, which communities anticipate and prepare for, and (7) they are occasionally combined with competitions.

Gibson et al. (2011) provide a compelling perspective on the role of festivals, emphasizing their enjoyable,

special, and exceptional nature. They highlight that festivals often serve as the sole time of celebration in small towns, filled with rituals of entertainment, spectacle, and remembrance. These events bring people together, fostering a sense of community and shared experience. Most individuals participate in festivals for the enjoyment, the novelty, and the pleasure of coming together.

Be this as it may, many scholars share the view that a cohesive and concise definition of the term ‘festival’ is still needed. Such a definition should be brief and unambiguous, that it might be easily used to identify festivals, and it should at the same time include all the basic features of festival events (Cudny 2014a). The definition offered by Cudny specifies that “a festival is an organized socio-spatial phenomenon that is taking place at a designated time—outside the everyday routine—increasing the overall volume of social capital and celebrating selected elements of tangible and intangible culture” (Cudny 2014a: 643). This author argues that his definition is comprehensive yet sufficiently precise to reflect the essential structural components of cultural festivals.

Recently, within the framework of the first international comparative study of music festivals using a uniform research style (<http://www.festudy.com/fr/presentation/>), definition of the term prompted long, hair-splitting debates. The usual broad definition of festival as an event that is limited in time and space, developing a specific artistic project and occurring at regular intervals, faces challenges in two particular areas. Indeed, the evolution of the festival landscape has introduced significant transformations within the event industry, rendering traditional definitions increasingly debatable. Here are some considerations: The notion of a fixed temporal limit for festivals has become more fluid. Many festivals now extend their presence beyond the official event dates by offering activities, workshops, and virtual engagements throughout the year. The transformation of festivals and their spatial dynamics indeed challenges traditional definitions and concepts. The strategy of decentralizing festival activities has diminished the significance of a singular, fixed location. By hosting events across multiple sites, festivals can engage a wider audience, accommodate more participants, and foster regional cultural exchange. Some festivals have adopted a mobile format, traveling from one site to another, thus reaching different audiences and adapting to various cultural contexts. Additionally, the duplication of festivals in other regions or countries enables the sharing of cultural narratives and artistic expressions on a global scale. This mobility and replication further blur the spatial boundaries traditionally associated with festivals. The evolution of artistic projects within festivals is indeed reflective of broader changes in contemporary practices. As festivals seek to

remain relevant and engaging, they often diversify their artistic offerings. While a festival may originate from a specific artistic niche, over time, it can expand to incorporate a variety of aesthetic styles and genres. This diversification not only attracts a broader audience but also encourages cross-pollination of ideas and artistic innovation. Festivals continuously strive to renew themselves to stay current and appealing. As for the periodicity of a festival, which refers to the frequency with which it is held, it is a multifaceted decision influenced by economic, demographic, cultural, and resource-related factors. By carefully considering these elements, festival organizers can determine the most appropriate schedule to ensure the festival’s success and longevity, despite which, the death rate in crisis contexts is very high (Négrier et al. 2013). The research team of Festudy project has met these objections (temporal flexibility, spatial expansion, evolution of the artistic project and periodicity) by adopting the view that such criteria must be applied with sufficient flexibility to take into account each festival, where interpretation can be either restrictive or extensive. For the purposes of this project, it was chosen to retain those events which, in addition to satisfying the above criteria, had organized at least two seasons by 2011 – suggesting a certain degree of periodicity. Moreover, all had to have scheduled at least five concerts over the course of a minimum of two days, implying a certain amount of deliberation over artistic programming choices (Négrier et al. 2013).

... and of ‘festivalization’ and “financialization”

Moving from definition of the concept of festival to that of ‘festivalization’, we should recall that cultural festivals are among the most common instruments of city promotion and have become one ‘must-have’ policy for contemporary urban planners. The city’s role as a reservoir of resources and its ability to generate value through the creation of new meanings has identified the development, scheduling, and attraction of festivals as one of its key strategic tools (Rausell-Köster et al. 2022). Apart from presenting and embodying new identities for revitalized areas, cultural festivals have become a crucial element in the construction of ‘happening’ continuity, galvanizing the cultural life of the urban space and creating proper ‘atmosphere’. These factors convert urban space into a place of constant festival—a phenomenon that Häußermann and Siebel (1993) termed the festivalization (*festivalisierung* in German) of urban policies and space when signalling the increasing importance of cultural festivals in urban identity-formation since the 1970s. Indebted to Boorstin (1961) and Debord (1967), these authors elucidated the concept of festivalization within a media context by highlighting that, to remain noticeable and

audible amidst the clamors of mass media, urban politics is focusing on temporal and spatial dimensions. Festivalization is thus portrayed as a media-oriented staging of the city (Häußermann and Siebel 1993). Scholars such as Hitters (2007; cultural-programming paradigm), Richards (2010; hyperfestivity), and Jakob (2013; eventification) subsequently elaborated on this approach where festivalization is placed in the context of urban planning.

Presented by Häußermann and Siebel (1993) as a “festivalization of urban politics”, other scholars have since regarded festivalization as implying not solely periodic mega-events but also (and primarily) small-sized gatherings that provide a continuous festival experience (Zherdev 2014). Also adapting Häußermann and Seibel’s term, Wynn and Yetis-Bayraktar (2016) see this process of festivalization – sometimes but not always an explicit and coordinated cultural policy – as a fusing of city branding with the post-industrial ‘experience economy’ in a potent blend of place-marketing and cultural consumption via accessible and resonant imagery and visceral encounters.

Festivalization can be defined as specific mechanisms of organization and formation of urban space and social activities as well as a method of entertainment of both city residents and tourists through increases in the quantity and quality of festivals (Karpinska-Kraskowiak 2009). Richards (2007) by ‘festivalization’ means mainly policies of mega-events, linking the festival to economic growth and investment attraction, while Hitters (2007) considers that festivalization implies continuous festivals, which establish a permanent presence in the urban fabric. Jakob (2013) emphasizes the scalar difference between festivalization and eventification, focusing her research on small-scaled festivals and other cultural events and thus speaking of ‘eventification.’ Zherdev focuses on bringing festivals to the neighborhood level; hence the term ‘festivalization’ is used in reference to a process of continuous and primarily (but not exclusively) small-scaled festivals. He argues that festivalization implies certain prioritization of attracting the creative classes over attracting tourists, thus promoting a place to be lived in rather than merely visited. For Nikolay Zherdev, it is a widely accepted fact that tourist destinations tend to build their marketing strategies on the basis of tourist seasonality (mega-events lasting several days are no exception), while festivalization implies lowering the scale of the festival while elongating the festival process, sometimes covering the entire year.

Furthermore, Zherdev alleges that the process of festivalization in the creative city influences everyday life: an eventful and creative atmosphere is formed through the penetration of festivalization into the daily experience of creative or cultural areas. Hence, he argues for a change

in the festivalization perspective from mega to micro, and from temporary to permanent—festivalization does not simply change the urban space for certain (limited) period of time but rather becomes part and parcel of everyday life in a modern creative city (Zherdev 2014). According to Cudny, the process of city festivalization exerts both direct and indirect influences on various elements of urban space. This strategy is employed for the development of cities, enhancing their image, and generating greater income. Through festivalization, cities can leverage cultural events to attract tourism, boost local economies, and cultivate a vibrant urban identity (Cudny 2016).

Exploring the academic literature, we can distinguish two interrelated types of festivalization: the first refers to cultural policies, while the second is related to urban space. Nonetheless, both aspects are interrelated and hardly separable. Festivalization as a process can also be regarded as a means of transformation of the urban space, turning the cultural environment of the city into an attractor by producing a positive image of festivalized space. Getz (2012) points at certain risks of ‘commodification’ and ‘commoditization’ that follow festivalization, leading toward a loss of cultural identities, whether attached to a particular festival, a creative quarter, or an entire city. Indeed, as an increasingly popular paradigm for development, festivalization (and cultural-creative regeneration in general) bears the risk of homogenization of spatial characteristics and diminishing the uniqueness of urban experiences (Bianchini 2004) to satisfy those looking for the “authentic” experience of the city (Russo and Arias 2009).

Johansson and Kociatkiewicz (2011) claim that the city does not merely serve as a backdrop for the festival; the festival also transforms the city, both by altering its spatial constitution and by conferring a particular identity on the location. Constructing the festivalized city therefore means interrupting, redirecting, and altering existing flows as well as creating new ones. The city transforms into an ‘experiencescape,’ a carefully crafted and artistically designed landscape that is strategically planned and organized (O’Dell 2005). The festival can temporarily become a hub for organizing the urban space, serving as a focal point for the reorganization of the flow, pace, and navigability of the city space while providing a means of legitimization for any reconfiguration of the city undertaken at the time (Kociatkiewicz and Kostera 2001). Geographer Doreen Jakob (2013) asserts that incorporating festivals into city planning has become a key strategy for promoting local urban and economic development, enhancing consumer experiences, and improving city branding. Additionally, the trend of festivalization has extended into urban and economic development at a

more localized level, evolving into a widespread phenomenon known as eventification.

So-hee (2016) alleges that we can speak of festivalization through its impact and its integration into the city. The advantages of a festival attract the attention of cities. The gradual development of closer ties between a festival and a city allows us to observe the role and contribution of the festival to the city in several ways. Festivalization can be understood in this way and summarized in three features referring to the link between the festival and society: regularity of the festival, its economic impact, and the festival's influence on the cultural ambiance of the city (So-hee 2016). In support of this third feature, Inez Boogaarts remarked that festivals create an enticing atmosphere that draws the attention of both the public and the international community to the city and its cultural ambiance (Boogaarts 1992a), while Grésillon noted that the theme of festivalization is connected to the creative city paradigm, which not only continuously produces art but also generates events to stimulate discussion and attention (Florida 2002 and 2005; Grésillon 2012). The cultural atmosphere is therefore an indicator for understanding the festivalization of a city.

A festival can perform different functions or roles, sometimes even simultaneously (Boogaarts 1996). Analysis of the literature and existing policies suggests that a festival can serve as a showcase, a creative destination, and an attraction for visitors. In 2012, Van Aalst and Van Melik employed these functions to develop a typology that outlines the role of festivals within urban policy. The festival can serve as a showcase for a city, and destinations can be branded by festivals (Derrett 2004). When connected to a certain location, a festival provides the city with a particular image. Consequently, numerous cities have regarded festivals as a kind of “quick fix” solution for their image issues (Quinn 2005). However, although urban festivals rely on place-differentiation and place-specific characteristics, they often offer similar and homogenized experiences (Waitt 2008) and become “formulaic” (Evans 2002). Boyle (1997) noted the role of festivals in re-imaging strategy and in civic boosterism—as a so-called Urban Propaganda Project.

From a managerial perspective, Négrier describes festivalization as the transformation of cultural activities, which were once presented in a consistent, ongoing pattern or season, into a ‘new’ event. For instance, a regular series of jazz concerts is reorganized into a jazz festival (2015). This reconfiguration can be seen as a response to processes of industrialization across the arts, heritage, and creative industries that has altered institutional and artistic forms, types of consumption, and roles within the production process (Jordan 2016). Festivals differentiate the live experience in a market dominated by virtual

entertainment opportunities and downloading (Connolly & Krueger 2005; UNESCO 2016); they offer economies of scale and specialization in marketing, ticketing, and site management; and in the case of outdoor events, festival capacities might be larger than most indoor venues, meaning festivals can book bigger headline acts (Nordgård 2016). To Négrier, this phenomenon should be understood as an expression of larger societal developments, or as an eventalization of regular cultural offers. Festivalization is strongly influenced by ‘presentism,’ a philosophical theory that asserts only the present is real, and can be explained as a result of changing consumer behavior in a liquid society (Bauman 2000, 2008; Blackshaw 2010; Richards 2010; Bouwer & van Leeuwen 2013; Négrier 2015).

According to Owe Ronström's (2016) detailed and compelling arguments, festivalization is just one of several ‘-izations’ that gained popularity following what may be referred to as ‘the processual turn’ in the social sciences, alongside terms like ‘globalization,’ ‘hybridization,’ ‘mediaization,’ and numerous others. Processual perspectives seek to reconstruct chronological sequences of interrelated events and actions that unfold over time within a specific context. In the context of festivals, the notion of festivalization serves as a conceptual tool that signifies a formatting process, specifically the adaptation of music and its performance to align with festival standards. Ronström argues that he first came across the use of the concept of festivalization in 1986 in a paper by American ethnomusicologist Mark Forry: *The Festivalization of Tradition in Yugoslavia*. Of course, in this case the perspective is very different from that of Häußermann and Siebel (1993), with their concern for urban policies and space. Forry focuses on festivalization as an analytic tool for describing a process of adapting music and musical performance to the festival format. According to Ronström, terms such as “event-culture,” “eventification,” “Disneyfication,” and “cultural fireworks” serve as different expressions that refer to the same idea (Ronström, 2016). Festivals both generate and convey, showcase and symbolize numerous trends associated with “globalization” and “postmodernity.” On one side, there is an emphasis on diversity, characterized by fusion, multiculturalism, eclecticism, crossbreeding, and the blurring of genres and categories. On the other side, there is a focus on homogeneity, involving the purification and reification of expressive forms and styles to create swift and distinct messages (Ronström, 2016).

Among the insights to the topic provided by Dutch researchers at the University of Rotterdam are the contributions of Hitters and Mulder (2020), who argue that festivalization has become a widely applied policy configuration which has far-reaching effects for urban cultures.

Such implications can be understood only by looking beyond their instrumental use as a strategy for urban growth or as mere effects of a numerical increase in festivals. Festivalization needs to be understood as a societal phenomenon intertwined with changing consumer habits, social practices, emergent markets, and developing government policies (Mulder et al. 2020)—or in other words, “a multi-layered concept, indicating simultaneous value creation for consumers, artists, cities, local economies and, not least, the live music strategic action field itself” (Mulder, Hitters & Rutten, 2020: 18). From their research in the Netherlands, it appears that stakeholders in the live music industry perceive festivalization as an inevitable reflection of contemporary society (Mulder et al. 2020). This does not imply a lack of challenges. Of course, rising numbers of festivals pose clear problems in terms of environmental management and urban planning, as well as in competition for venues—problems that can lead to public protests against festivals (nuisance, noise, environmental damage) and subsequent policy intervention. But festivalization is also a strategy, both for venues that are part of the existing infrastructure and for urban policies that have actively engaged in the use of festivals in many ways, as predicted by Häußermann and Siebel (1993).

In this paper, we seek to demonstrate that the phenomena of festivalization and financialization are intertwined in specific urban settings and types of festivals (commercialized music festivals), particularly those where opportunities for quick profit are most apparent and the drive for growth is a persistent theme.

Some scholars interpret financialization as a term that encapsulates the increasing impact of capital markets, their intermediaries, and related processes on modern economic and political life (Pike and Pollard 2010; Ward 2016). Many phenomena and processes within the contemporary economy are regarded as expressions of financialization, including: (1) The expanding globalization of financial markets, coupled with the surge in transaction volumes that have surpassed the growth of commodity flows, has resulted in financial institutions and their revenues exerting a more significant influence on the economy; and (2) Changes in the ownership composition of companies, where owners from the financial sector play a more significant role, often involve ‘impatient’ capital that prioritizes short-term returns on investment over long-term gains.

Financialization is understood as an inherently spatial phenomenon that influences social dynamics by promoting the geographical expansion of finance into the realms of production, exchange, and consumption of built environments (Clark et al. 2015). This process simultaneously strengthens financial authority over the creation of

urban spaces and the performance of urban governance. Major financial corporations recognize the potential of cities as a growing market for financial investments and products. A common area of research focuses on the idea that urban financialization is primarily directed towards enhancing the exchange value of urban areas, rather than their use value. This suggests that cities are increasingly regarded as lucrative business ventures, rather than being appreciated for their livability, as evidenced by gentrification processes (Theurillat 2023).

Clearly, both the music industry and festivals have been included in these processes. According to Galuszka and Legiedz (2024), the increasing interest of financial markets in investing in music rights exemplifies the financialization of music. Although music rights have been traded for many years, most of these transactions historically occurred between parties within the music industry. Recently, however, there has been a noticeable entry of pension funds, banks, and private equity firms into the music rights market (Galuszka and Legiedz 2024). The growing significance of intellectual property rights within the music industry, coupled with their emergence as an appealing asset class for investors from outside the music sector, signifies a substantial shift with potentially extensive implications. This includes investments in and acquisitions of song catalogs (song rights) and sound recording catalogs (master rights).

Talking about the so-called night-time economy, Giacomo Bottà (2023) opts to discuss cultural extractivism instead of cultural financialization. He contends that the value of music within urban environments cannot be solely measured in economic terms, as it is also shaped by intangible factors, bordering on the non-representational and ephemeral in nature. Nevertheless, it appears indisputable that in urban settings, including medium-sized cities, commercial festivals have evolved into tools for drawing profits from the region. Furthermore, they exemplify the strategies and goals of large financial corporations.

Until the 1990 s, the music festival industry in Spain remained the final bastion of independence within an entertainment sector that was swiftly consolidating. Currently, the commercial music festival sector, encompassing events with over 50,000 attendees, is dominated by highly competitive and well-funded independent music promoters. According to Soffer (2018), major corporations (Superstruct Entertainment, Live Nation, Yucaipa Companies, Vivendi, AEG, CTS Eventim, etc.) have transformed the music festival industry by acquiring live music promoters, concert venues, and artist management firms. The era of music festivals being merely countercultural events, such as Woodstock, has passed. Nowadays, they have evolved into massive mainstream spectacles,

attracting enormous crowds and generating substantial revenue.

Framing the issue of festivals within the scope of urban studies

When analyzing the state of the art of festival research, diverse scholars have concluded that from the 1960 s onward, this research topic has grown considerably in Europe, particularly in two distinct periods: at the end of the 1980 s, and at the beginning of the 2000s. The initial phase highlights the significance of the territorial context in shaping festival dynamics. The subsequent period aligns with the proliferation of the festival format, serving as the “Swiss Army Knife” of the cultural sector (Négrier et al. 2013). During the latter period, preliminary research was undertaken to examine the economic effects of music festivals (Baker Associates 2007; Bracalente et al. 2011; Tohmo 2005). Beyond their immediate economic impacts, music festivals have also been analyzed concerning their influence on the artistic environment and from the perspective of cultural democratization goals (Dowd et al. 2004).

Recent decades have brought significant changes to the global economy. The role of advanced services has risen, and human activity has gradually come to be based on innovativeness. The economic role of culture has increased, and the media, film production, and various forms of artistic expression all bring increasing profits. The theory of the creative class, introduced by Florida in 2002 and 2003, was complemented by the theory of creative and cultural industries, as proposed by Scott in 2000 and 2010, Pratt in 2008 and 2013, and Hutton in 2004. The economic value of all these activities has increasingly garnered appreciation, as they generate jobs and income for urban regions as part of the cultural economy. They are furthermore becoming an important element in plans for local economic development, thus exerting an impact on the economic bases and social structures of cities. The increasing demand for products from cultural industries has emerged due to the development of ‘experience societies,’ a phenomenon described by the term ‘the experience economy’ (Freire-Gibb 2011; Lorentzen 2012; Pine and Gilmore 1999). The experience economy emerged as a concept in the 1990 s to denote a socio-economic system where aesthetic experiences (rather than goods or services) form the basis for generating value. First theorized from a sociological perspective by Schulze (1992) and later brought to popular attention by Pine and Gilmore’s business-oriented approach (1999), this proposed framework has since provided a basis for exploring how experiences are produced and consumed in a variety of contemporary settings (e.g. Hjorth & Kostera 2007; Sundbo and Darmer 2008). The growth of

the cultural and experience economy has had a positive effect on the development of festivals, which are culture products that offer extraordinary experiences. Festivals enrich the spaces of cities and are offered as products to investors and tourists alike (Cudny et al. 2012; Johansson & Kociatkiewicz 2011; Lorentzen 2013). In the twenty-first century, all countries have been faced with both series of annual festivals and the diversification of festival types, locations, and audiences (Fouccroulle 2009). Festivals have also become economically attractive to the consumer and useful for the testing of culture, forming a significant feature of the socioeconomic and cultural landscape of contemporary everyday life (Guerra 2016).

Festivals have always been part of city life, but their relationship with their host cities has continually changed, John and Margaret Gold provide a reflective and evidence-based historical survey of the processes and actors involved, charting the ways that regular festivals have now become embedded in urban life and city planning (Gold and Gold 2020). The authors explore the connection between festivals, culture, location, and economy in Western cities across Europe and North America from the nineteenth and twentieth centuries. The four primary chapters provide case studies of groundbreaking European arts festivals, starting with the Venice Biennale and Film Festival, and progressing to the Salzburg Festival, the Cannes International Film Festival, and the Edinburgh International Festival.

Support for a festival often means support for a stagnating city and the companies based there. In this vein, festivals become an aspect of restructuring strategies (for example in post-industrial cities) and are known as culture-led regeneration strategies, including both event-led and festival-led regeneration strategies (Bailey et al. 2004; Evans 2005; Hall and Page 2012), place marketing and efforts to achieve community cohesion (Finkel and Platt 2020). The aforementioned processes have been studied within the fields of urban and cultural geography. Geographers studying festivals have noticed the growing role of culture in the economy and in creation of the urban image (Barthon et al. 2007; Boland 2010; Boyle et al. 2008; DiMéo 2005; Garat 2005; McClinchey 2008; O’Callaghan and Linehan 2007; Richards and Wilson 2004).

The interrelationship between the geography of festivals and urban studies is evident in the fact that a major research issue within urban geography is the role of festival in urban development. In this context, Cudny (2014b) refers to studies examining the economic and promotional effects of festivals, along with their influence on the restructuring of post-industrial cities, as discussed by Hughes (1999), Lorentzen (2013), Richards & Wilson (2004), and Sundbo (2013). However, Cudny believes that the number of empirically well-documented geographical

works of this type remains insufficient. Most authors rely mainly on data provided by festival organizers and reports by local authorities, and these sources may be inaccurate for a variety of reasons.

Despite the weaknesses indicated, the truth is that the contributions from geography that combine research on the role and evolution of festivals and urban studies have never stopped growing over the past two decades. The majority have dealt with festivals in terms of culture-led urban regeneration, but while most publications on the subject focus on what a festival can do for a given place, few reflect on what a place can do for a festival (Van Aalst and Van Melik 2012). This is remarkable, since festivals have a long-established association with cities and sometimes become a vehicle for expressing the close relationship between identity and place (Quinn 2005: 928–9). Over time, the festival and the host destination can become inextricably linked (Getz 2008). Similarly, another contribution that extends beyond geographical boundaries explores the emotional and social connections people have with specific locations. It highlights the advantages of associating places with festivals, using the New France Festival in Quebec as a case study (Arelano 2011). Be that as it may, individual festivals differ in their degrees of ‘place dependency’—some are closely connected to the cultural infrastructure and to symbolic capital, whereas others have scarcely any relationship with the facilities, activities, or events occurring in the city (Boogaarts 1992b).

Place-bound festivals often involve collective celebrations with diverse aims: building social cohesion by reinforcing ties within the community (Rao 2001); learning about cultural traditions; celebrating a collective sense of belonging to a place (Lorentzen 2009); and drawing on shared histories and local cultural practices (Quinn 2005). Place-bound festivals thus offer both tangible and intangible experiences that connect people to places (Derrett 2003). In turn, the notion of the ‘placeless’ festival emphasizes the disarticulation between communities and new types of places—highly standardized and exchangeable—which makes them largely meaningless. In this context, placeless festivals are those whose profitability, identity, or success is not tied to a specific location, but rather to a particular type of location or multiple locations. This loss of urban authenticity (also noted by Zukin 2010) reduces the need for festivals to be located at a certain place and makes them relatively ‘footloose’ (Van Aalst & Van Melik 2012). As Irina van Aalst and Rianne van Melik argue (2012), the use of culture as a tool to achieve wider economic and restructuring goals (that is, the instrumentalization of culture) has the ironic effect of displacing local distinctiveness, which in turn weakens the ties between cultural production and consumption

(Griffiths 2006). In other words, whereas festivals are increasingly seen as important means for places to stand out in inter-urban competition, the importance of specific places for mounting festivals seems to be weakening.

The relocation of certain festivals highlights the growing competition among cities for hosting large-scale events. These events, often global in nature, lack a true connection to local identity, rendering them somewhat ‘placeless.’ Such festivals are a destination in themselves. Prentice and Andersen believe that this character is part of the “experience of gregariousness” which may ultimately “be independent of any specific place or location... it is place-nonspecific” (2003: 12–13). This risk is especially elevated when the original founders of a festival withdraw or pass away, and multinational corporations assume control. This situation is exemplified by the North Sea Jazz Festival, which was relocated from The Hague to Rotterdam after 30 years (Van Aalst and Van Melik 2012). The major players in the music industry are not as connected to a specific location as the original founders were. Consequently, the choice of a festival’s location may be influenced more by corporate decisions than by a founder’s personal connection to a certain place, a compelling festival strategy, or the distinctive features of a city (Van Aalst and Van Melik 2012). This complies with a broader situation within the cultural realm where art, music, and sport have been commandeered by marketing agencies and managers, thus transforming from arts and culture into arts and culture industries (Waterman 1998). Despite everything, festivals might become still more footloose and less place dependent, although this does not imply that they no longer have a connection to a host city.

From other fields of social science, scholars have used the experience economy framework to explore the ways in which urban space is staged, acted upon, and transformed in order to provide an intended experience (Johansson and Kociatkiewicz 2011). The tension between the managed and the subversive becomes an essential factor that shapes urban experience-based projects. When the city is situated in the experience economy, it becomes subsumed into a discourse of global competition where the crucial feat of distinctiveness (and its subsequent economic benefits) is achieved by means of presenting the city as a gigantic experience-based playground. A city is always rich in experiences, but only particular kinds can serve the purposes of the experience economy. Thus, it is essential to manage the process of creating experiences effectively. The festival, viewed as a marketable and aesthetically appealing event confined to a specific time and place, offers an enticing method for this kind of production (Johansson and Kociatkiewicz 2011).

Giacomo Bottà (2008) maintains that popular music (and many festivals would be included in this category) has a significant impact on cities. These effects can best be grasped in connection to a city's representation, materiality, and branding. He contends that popular music has the ability to independently transform place-images and representations through the use of 'textsapes', soundsapes, and landscapes. He further argues that popular music can independently influence the physical environment, such as through urban regeneration efforts. Wynn, drawing from the discipline of sociology, has formulated a conceptual framework that elucidates the manner in which music festivals typically integrate into modern urban landscapes in the United States. He identifies 3 key common configurations—the citadel, core, and confetti patterns—a citadel pattern—Newport's festival- (i.e. as a single spatially circumscribed location), a core (with events concentrated in several downtown venues), and confetti pattern, "which sprinkles festival events over a wide area", both Nashville and Austin festivals share the latter two spatial configurations (Wynn 2015).

Recently, the research project 'Festivals, Events and Inclusive Urban Public Spaces in Europe' (FESTSPACE) (2019–2022) funded by the Humanities in the European Research Area (HERA) programme 'Public Spaces: Culture and Integration in Europe' has explored how festivals and events affect urban places and public spaces focusing on the positive and negative ways that festivals affect cities by examining festive spaces as contested spaces. In the book that compiles the main topics discussed and the results of the project, some evidence stands out, for example the fact that festivals are often used by municipal authorities to break down symbolic barriers that restrict who use public spaces and what those spaces are used for. However, the rise of commercial festivals and ticketed events means that they are also responsible for imposing physical and financial obstacles that reduce the accessibility of city parks, streets and squares (Smith et al. 2022).

The impact of festivals on the management and development of urban spaces, often referred to as the "festivalization of Urban Spaces," has been explored extensively by various scholars and authors. For instance, Cudny (2016) explores this phenomenon through the example of Łódź, a city in Poland that transitioned from socialism. Nunes et al. (2022) use the Mexefest festival in Lisbon as an example to explore the framing, curation, and experience of music festivals in urban settings during the digital streaming era. Through ethnographic fieldwork, their study investigates how festival organizers curate the urban festival experience for both residents and tourists. Certainly, the most thorough examination of the festivalization of music festivals in Portugal is provided by Paula

Guerra (2016). Her work delves into the dynamics from 1968 to 2015, emphasizing the remarkable increase in the number of festivals over the last twenty years and their proliferation across the nation, particularly along the Atlantic coast and in metropolitan regions.

Hitters and Mulder (2020) delve into the factors contributing to the heightened focus on live music and events in political policies, as well as the trend of festivalization in The Netherlands from 1966 to 2018. The Netherlands ranks among the nations with the highest concentration of festivals globally. Upon reviewing the context, they concentrate on three case studies—Amsterdam, Rotterdam, and Utrecht—where music policies have been progressively and actively integrated into broader cultural and event policies within these Dutch cities.

Unfortunately, the current academic literature lacks studies that directly connect the processes of financialization and the expansion of large commercial festivals to the urban fabrics where they are staged. The available research primarily consists of exploratory studies aimed at comprehending the effects of major players on the live music industry and the markets for popular music festivals. A case in point is the research conducted by Huijgh and Evens (2012), which examines Live Nation's influence on the music festival market in Belgium.

Why are we focusing on medium-sized cities?

Interest in medium-sized cities on a global scale emerged in 1960, when the World Bank began to focus on urbanization and urban development. So-called "secondary cities" were recognized as strategic for the balanced regional development of developing countries. In Europe, interest in medium-sized cities has been significantly fuelled by the extensive French academic contributions since the 1960s. These contributions, particularly from DATAR (*Délégation interministérielle à l'aménagement du territoire et à l'attractivité régionale*), are now concentrating on exploring future scenarios (projected for the year 2040) concerning the spatial systems created by these cities (Aubert et al. 2011). Towards the end of the twentieth century, the *moyennes villes* in France experienced a reclassification to *villes intermédiaires*, as suggested by Gault (1989) in his study, following the acknowledgment of their intermediary territorial functions. The Spanish authors Bellet and Llop (2000, 2003, 2004), as well as Ganau and Vilagrassa (2003), later embraced this term, infusing it with their unique contextual interpretations, as observed by Hall (2000) in their respective research.

The beginning of the twenty-first century represented a turning point in terms of interest in the territorial role of medium-sized cities, particularly those in Spain. The Lisbon Agenda (European Commission 2000) aimed to enhance the competitiveness of Europe by fostering

innovation and knowledge-based industries, particularly in metropolitan regions. These areas have proven to be the most responsive to the demands of contemporary economies and globalized development, being both a result and a facilitator of such growth. By the end of the twentieth century, these regions had already emerged as Europe's preferred areas for development, as evidenced by studies conducted on the prospects of several major cities, primarily located in central and northern Europe (European Commission, 1990).

Regarding the role of medium-sized cities, the CEC (1999) recognized their importance as the backbone of peripheral territorial areas, serving as hubs for the development of activities and the delivery of various services. This recognition was initially made in the late twentieth century when the European Union devoted a portion of its economic resources to provide essential public infrastructure to cities in southern countries such as Spain and Portugal (Domingues 2006). In 2006, the European Spatial Planning Observation Network (ESPON, 2006) published a study on *The Role of Small and Medium-Sized Cities in Europe* (SMESTO: Small and Medium-Sized Towns), adding little to the interest in promoting cooperation networks among such cities, whether at national or international level, through the implementation of joint projects and the mutual exchange of experiences (aimed at enhancing prosperity and improving quality of life). In 2013, this same European body published the final report of the TOWN project (*Small and medium-sized towns in their functional territorial context*). Within the conceptual framework established by the previous study conducted in 2006, this report confirms the connection between the morphological, administrative, and functional approaches used to define and identify these categories of cities. As recently as November 2023, a new draft policy paper goes one step further exploring the capacities of small and medium-sized towns and cities (SMSTC) to be involved in integrated endogenous development initiatives (ESPON 2023).

Culture has become an essential policy response to enhance attractiveness, foster innovation, and promote social cohesion across all levels of policy interventions (Evans 2002), including those in medium-sized cities. Nonetheless, there is an evident necessity to progress in the development of research that explores the connections between various cultural sectors and urban settings in medium-sized cities, along with their impacts. This should be done while ensuring the essential implementation of comparative and agreed-upon metrics. In alignment with these objectives, advancements have been made in examining the urban cultural economy and its processes and impacts in small and medium-sized Spanish cities (Barrado et al. 2020, 2022; Escalona-Orcao et al.

2021, 2022). Indeed, despite the extensive body of literature available on this subject within the social sciences, most studies concentrate on major global metropolitan areas, which form the basis for the primary theories in this field. It is precisely due to this focus and the resulting epistemological window that the research project encompassing this contribution was initially developed.

Two Spanish scholars have explored the role of a music festival (*Mercat de Música Viva de Vic*) in the evolution of a medium-sized city. Their research includes analyzing residents' perceptions of how this festival impact the everyday life of the city (Morales and Pacheco 2018). Additionally, other scholars have evaluated the potential of cultural events, such as the renowned WOMAD music festival in Cáceres, to enhance and shape the image of the host city within the framework of tourism destination marketing strategies (Duarte et al. 2018). Chronologically speaking, WOMAD expanded in tandem with the emergence and establishment of the 'world music' genre. Nevertheless, the thematic area concerning music festivals in medium-sized cities continues to exhibit significant gaps, particularly in Spain, where the phenomenon of festivalization has not been explored at this level, not to mention the financialization of commercial festivals.

Materials and methods

From a methodological point of view, a time-frame has been selected to focus on what happened in quantitative terms from the creation of the first festival (1939) that remained active until 2019—the final year for which we have records (just before the outbreak of the Covid-19 pandemic). We chose to disregard data covering the period 2020–2023, given the unstable scenario that the live music industry has been confronting. Due to lockdowns and severe restrictions on concentrations of people into a single venue, the year 2020 proved to be a 'lost' year overall, and while 2021 saw the beginning of a recovery, this remained limited, especially for large festivals. It was not until 2022 that the sector's vitality returned, although by that point, some festivals had disappeared while others were beginning to emerge.

Although definitions differ on the concept of the music festival, this contribution focuses on festivals as cultural events in which a series of live music performances are presented, and which were held through at least 2019 (with the intention of continuity, although schedules were later disrupted during the pandemic). This definition responds to the contemporary idea of music festivals and excludes other musical events such as contests and competitions. Likewise excluded are musical celebrations that belong to the stable program of the host city, as well as any musical event that falls within the programs of local festivities of respective municipalities. In the

case that these were held during overlapping dates, the “decoupling” of the same (original brand or name, own legal entity, allocation of a specific budget, etc.) was duly considered.

To embark on this examination, we have drawn from a wide range of secondary sources: official statistical sources (INE) such as the 2020 Cultural Statistics Yearbook of Spain’s Ministry of Culture and Sports, as well as data from sources and websites including the National Institute of Performing Arts and Music, the Spanish Association of Classical Music Festivals (FestClásica), and the following: <http://www.festclasica.com/festivales/>; <https://www.entre88teclas.es/festivales-de-musica-clasica-en-espana-listado>; <http://festivalesflamencos.blogspot.com/>; <http://afflamencos.org/>; <https://celtadigital.com/festivales/>; <https://www.apoloybaco.com/jazz/>; <https://fanmusicfest.com/calendario-festivales>; <https://www.dodmagazine.es/festivales/>; <https://www.festicket.com/es/festivals/>. Exhaustive scrutiny was given to the official web pages of the sample of selected cities. Other sources included reports from OBS Business School on festivals in Spain, and systematic consultation was made of the official pages (where such exist) of each and every one of the 402 music festivals identified.

Finally, and to close this first part of the analysis by focusing on the classification of music festivals, it should be recalled that no clearly established typology currently prevails. However, several experts suggest as a criterion the musical genre, establishing categories including: electronic music festivals, rock, jazz, pop, indie, reggaeton, classical music festivals (piano, trumpet, symphonies, operas), folk or traditional music festivals, and flamenco festivals. Perhaps the paradox of these proposals is that they clash with a conception of the category of musical genre wherein musical compositions that share certain criteria of affinity are brought together, such as the function for which they were conceived (dance music, religious music, profane music, dramatic music, incidental music, film music...), their instrumentation (vocal music, instrumental music, programmatic music, electronic music...), the social context in which they were composed, or the contents of their lyrics.

Thus, while the traditional academic classifications of musical genres have mainly considered the function of musical composition, the genre classifications of modern music (used by the recording industry, or by Authors’ Societies) have in the end assimilated the concept of musical genre to that of musical style, distinguishing three large families of style or genre: classical music, folk music, and popular music. Additionally, and within the latter subcategory or type, we differentiate the following: pop, rock, jazz, Afro-American music, Latin American music, electronic music, variety music, and world music.

In short, the musical style would be the set of characteristics that individualize the works of a musician or the musical tendency of an era, based on criteria such as: a) melodic and harmonic characteristics; b) rhythmic characteristics; c) typical instrumentation; d) the structure of the work (duration, movements, sections, etc.); e) the musical texture; and f) the rules and techniques of composition and interpretation. In any case, even the most rigorous classifications do not avoid specific attribution problems, as some musical styles (such as flamenco, tango, or various Latin rhythms) can appear indistinctly within the category of traditional/folklore music or in different subcategories of popular music. To further muddle the picture, many of these styles have in recent times been merged into a new subcategory known as world music, popularized in the 1980 s with the clear commercial vision of integrating non-Western traditional music (Erlmann 1996), but broadened over time and made more flexible to include sub-genres such as ethnic fusion, in what some authors define as a process of deterritorialization of place and identity (Connell and Gibson 2004).

Our practical proposal draws on the classification used by the *Festudy* project, the first international comparative study on music festivals using a harmonized research method (Négrier et al. 2013). After the inescapable debate, it was agreed to pursue classification into five broad categories, to which we have added a sixth—that of flamenco festivals. These are: 1) Classical music festival; 2) Flamenco festival; 3) Jazz/Blues festival; 4) Multi-Style/Urban festival; 5) Pop/Rock festival; and 6) Traditional/World music festival (Table 1).

While the initial time-frame was designed to analyze the growth and spread of the different music festivals and their characteristics (spatial location, date of creation, number of editions held, musical style, organizing institution, etc.) connected with the process of festivalization, a second and more limited time-frame of 2000–2023 has focused on analysis of the processes of financialization observed in the field. For this purpose, we have carried

Table 1 Breakdown of the music festival in small and medium-sized cities by music style category in 2019

| Festival category by music style | Total number |
|----------------------------------|--------------|
| Classical music festival | 78 |
| Flamenco festival | 11 |
| Jazz/Blues festival | 107 |
| Multi-Style/Urban festivals | 43 |
| Pop/Rock festival | 119 |
| Traditional/World music festival | 44 |
| Total | 402 |

Source: Authors’ elaboration based on a wide range of specialized websites

out exhaustive monitoring of the merger-and-acquisition processes involving foreign investment funds and large multinationals through the sector's yearbooks and the specialized media.

From a spatial perspective, we focus on small and medium-sized Spanish cities. Although the most up-to-date European proposals (Dijkstra and Poelman 2012) and DG Regio identify as 'towns' urban centers with a population of between 5000 and 50,000 persons and a population density between 300 and 1500 inhabitants per square kilometre, this definition does not rely on functions, funding, or feudal history but is based purely on population size and density; thus we use for the purpose of this contribution the Spanish statistical classification, which sets the limit for urban municipalities at a minimum of 10,000 inhabitants. In other words, a small city is defined as having a population ranging from a minimum of 10,000 to a maximum of 50,000 residents.

To this initial group of small cities, we include an examination of medium-sized Spanish cities, categorized by their population size. For this purpose, we work with a sample of medium-sized Spanish cities, each having a population ranging from 50,000 to 300,000 residents, which is a commonly employed classification criterion in the relevant literature (Escudero et al. 2019; Andrés and Bellet 2022). To enable comparison with other reports from the same research project, we distinguish between two subcategories within the group of medium-sized cities: those with populations between 50,001 and 100,000, and those with populations ranging from 100,001 to 300,000 (Table 2).

Medium-sized cities in Spain are not evenly distributed; instead, significant empty spaces exist, as illustrated in Fig. 1. From this, the following observations can be made: a) one-third of cities with populations exceeding

50,000 are located along the Mediterranean coast, with a similar share situated in major metropolitan areas; b) in 2019, there were 136 cities classified as medium-sized, with over 40% found in large metropolitan regions, 28% serving as provincial or regional capitals, and almost half of the remaining cities concentrated in six Mediterranean provinces.

Results

An increasing and spreading process of festivalization

The phenomenon of festivalization has taken over the world, as noted by Ronström in 2011, and Spain along with its network of small and medium-sized cities, is certainly no exception. On one side, a limited number of standardized festival formats have proliferated across the nation, adhering to a similar institutional framework and approach. Conversely, festivals have also become more varied. In recent decades, festivals have evolved into popular celebrations that cater to diverse audiences, featuring various musical genres and a wide array of non-musical activities. One of the driving forces behind the proliferation of festivals is the increasing trend in tourism. The festival industry delivers the experience, while the tourism sector attracts the attendees, resulting in expansive festival landscapes, particularly during the summer months.

For some scholars, the artistic project is the heart of the festival, as this gives coherence and external projection to the festival itself. Indicators include musical genre/style, the proportion of emerging or national groups scheduled (compared to those already established or with an international profile), the presence of women in the line-up, the capacity to program and interrelate local performers and/or foreign artists, etc. (Bonet 2011). In short, what is prioritized here is the festival's supposedly unique

Table 2 Breakdown of the municipal structure by size in 2019

| Municipalities by population size | 2019 | | |
|---|--------------------------|------------------|-----------------------------|
| | Number of municipalities | Total population | % of the Spanish population |
| Cities with over 1,000,000 inhabitants | 2 | 4,902,888 | 10.43 |
| Cities between 500,001 and 1,000,000 inhabitants | 4 | 2,732,531 | 5.81 |
| Cities between 300,001 and 500,000 inhabitants | 6 | 2,256,679 | 4.80 |
| Medium-sized cities between 100,001 and 300,000 inhabitants | 51 | 8,939,781 | 19.01 |
| Medium-sized cities between 50,001 and 100,000 inhabitants | 85 | 6,075,765 | 12.92 |
| Small cities/towns between 10,001 and 50,000 inhabitants | 605 | 12,553,110 | 26.69 |
| Small towns between 5,000 y 10,000 inhabitants | 549 | 3,865,826 | 8.22 |
| Rural municipalities below 5,000 inhabitants | 6829 | 5,699,628 | 12.12 |
| Total | 8131 | 47,026,208 | 100.00 |

Source: National Statistical Bureau. 2019. Authors' elaboration

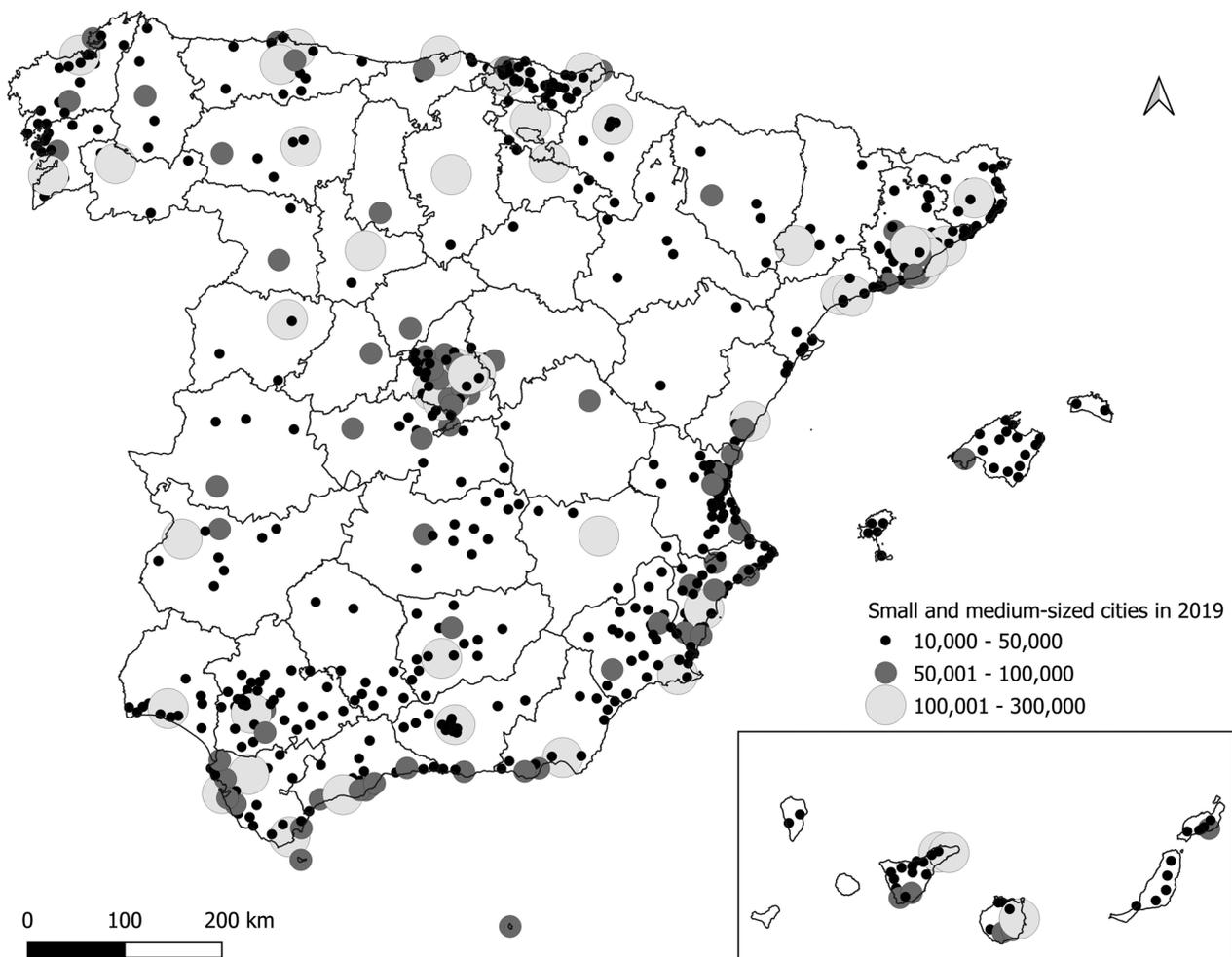


Fig. 1 Spatial pattern of small and medium-sized cities in Spain by population size Source: National Statistical Bureau, 2019. Authors' elaboration

artistic and cultural value. However, it cannot be overlooked that in the past three decades, commercial and for-profit festivals—specifically those devoted to any of the myriad sub-genres of popular music (pop, rock, jazz, Afro-American music, Latin American music, electronic music, etc.)—have proliferated at an astonishingly rapid rate. Their approach to line-up and scheduling, according to the judgement of the most reputable cultural managers, inevitably affects their artistic project and conditions its cultural impact (Klaic 2014).

In Spanish small and medium-sized cities we find music festivals devoted to almost any style or culture (Table 1). Among these, we would venture to say that, at present, the most outstanding styles (whether due to tradition or the impact they produce, and all sizably represented on the Spanish scene) are classical music, jazz/blues festivals, and pop/rock, including sub-genres attached to the latter such as electronic music, techno, or house music. However, in absolute figures, pop/rock

(119) and jazz/blues (107) festivals are most prevalent, followed at a great distance by classical music (78), folk/world music (44), multi-style/urban festivals (43), and flamenco (11). Since the mid-1990s, there has been a noticeable acceleration in the establishment of festivals (as illustrated in Fig. 2). This trend has prompted some experts to adopt the term “festival bubble,” borrowing a concept commonly used in real estate economics.

Classical music was the primary focus of most music festivals until they evolved into more professional events. Despite these changes, classical music continues to hold a prominent and culturally significant value, making it the music style that receives the most public funding and protection from government entities. In fact, the three oldest festivals in Spain staged in medium-sized cities are the *Quincena Musical de San Sebastián* (1939), the *Festival Internacional de Música y Danza de Granada* (1952), and the *Festival Internacional de Santander* (1952). Both the San Sebastian and Santander festivals are solely

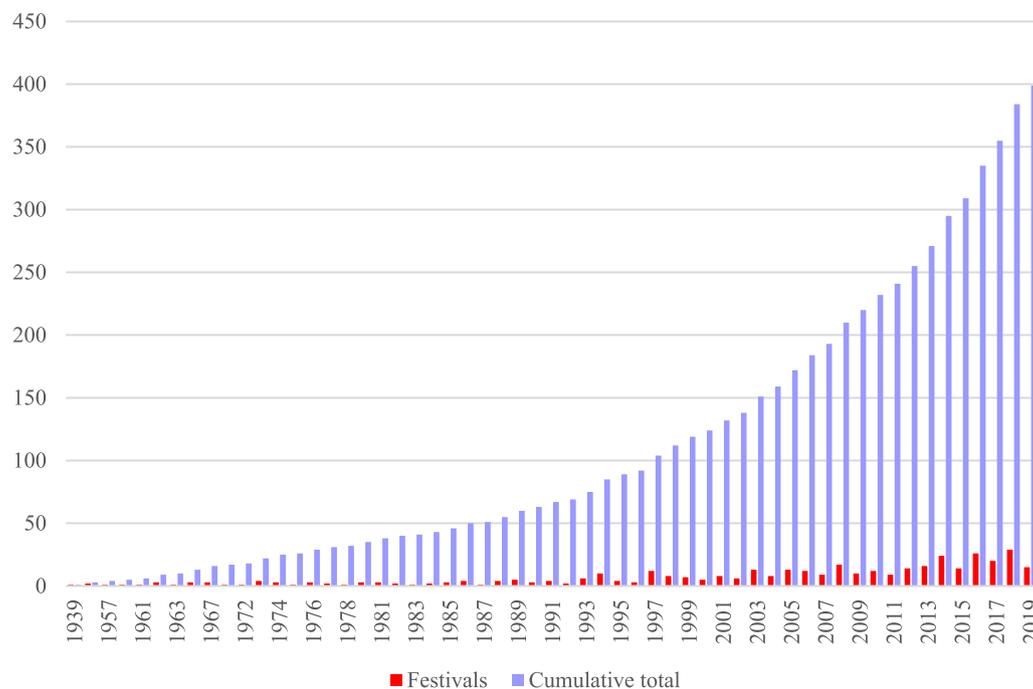


Fig. 2 Annual market entry (between 1939 and 2019) and cumulative total of the music festivals held in 2019 in small and medium-sized cities
Source: Authors' elaboration based on a wide range of specialized websites

focused on this specific music genre. They were established as part of the Franco regime's propaganda efforts, serving as instruments of prestige and cultural diplomacy. The goal was to align Spain with other European nations and mitigate diplomatic isolation (Ferrer, 2019). To those already mentioned, we might add long-standing festivals such as the *Semana de Música Religiosa de Cuenca* (1962), the *Semana de Música Antigua de Estella* and *Festival de Pollença* (both established in 1967), the *MUSEG—Festival Musical de Segovia* (1976), and the festivals of *Torroella de Montgrí* and the *Festival Internacional de Música Pau Casals al Vendrell* (both dating back to 1981).

For over thirty years, classical music festivals have consistently introduced new initiatives annually. These initiatives have shown comparable numbers in absolute terms, with new projects steadily emerging in both small and medium-sized cities, as depicted in Fig. 3. This trend is well-represented across various scales (Table 3). Nonetheless, the reality is that, comparatively speaking, the significance of classical music has been diminishing as other musical genres, particularly pop-rock, have gained increasing prominence in the overall music scene. Certainly, the distinct characteristics of each project are influenced by the territory where it originates, the institutional structure supporting its inception and growth, the financial resources available, and the artistic vision.

These factors collectively determine the project's ability to broaden its reach, foster audience loyalty, and produce economic benefits and favourable externalities. Nearly 45% of all classical music festivals take place in small cities/towns. However, it is indeed the case that the festivals with the greatest visibility and financial resources are located in medium-sized cities.

As illustrated in Fig. 3, aside from the festivals dedicated to classical music, flamenco festivals boast the most enduring tradition. Among the eleven recorded festivals, only one has been established for less than ten years: *Flamenco on Fire*, which has been held in Pamplona since 2014. The majority are more than half a century old, with examples of high national and international prestige such as the *Festival Internacional del Cante de las Minas* (1961) in La Unión. Besides the two previously mentioned, the remaining nine exhibit a significant territorial pattern, being located in small and medium-sized towns in Andalucía. In these cases, the territory plays a key role, as the style is deeply embedded in the region's musical and dance traditions.

Jazz and blues music festivals made their way to Europe in the late 1950s. While they do not hold as prominent a position as pop or rock festivals, which draw larger audiences, or classical music, which is regarded with greater prestige, they maintain their relevance in Europe thanks to a dedicated and mature audience. In Spanish small and

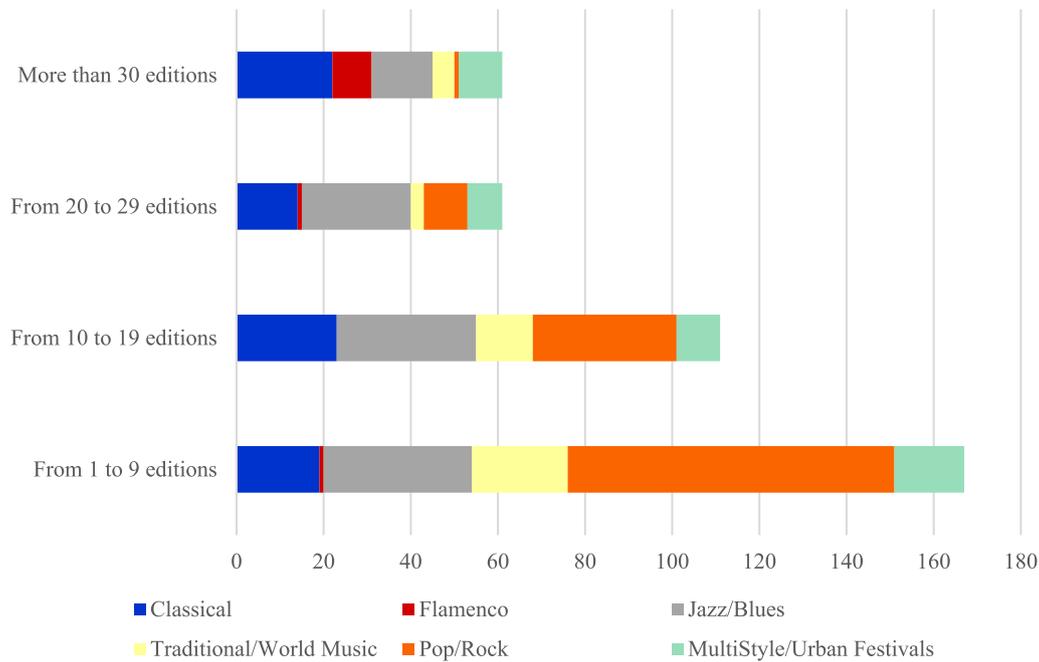


Fig. 3 Breakdown of festivals held in 2019 in small and medium-sized cities according to musical style and number of editions (from 1939 to 2019). Source: Authors' elaboration based on a wide range of specialized websites

Table 3 Breakdown of festivals held in 2019 in small and medium-sized cities according to musical style and municipal size

| Festivals according to musical style | Municipalities by population size | | |
|--------------------------------------|---|---|--|
| | Small cities/towns of between 10,001 and 50,000 inhabitants | Medium-sized cities of between 50,001 and 100,000 inhabitants | Medium-sized cities of between 100,001 and 300,000 inhabitants |
| Classical | 35 | 19 | 24 |
| Flamenco | 7 | 1 | 3 |
| Jazz/Blues | 48 | 28 | 31 |
| Traditional/World music | 18 | 12 | 14 |
| Pop/Rock | 61 | 33 | 25 |
| Multi-Style/Urban | 14 | 15 | 14 |
| Total | 183 | 108 | 111 |

Source: Authors' elaboration based on a wide range of specialized websites

medium-sized cities, the earliest festival in our sample is *Jazzaldia*, which began in 1966 in San Sebastián and drew 168,000 attendees in 2019. Otherwise, diversity is the predominant note, with a large number of small festivals lasting on average just over five days and taking place in well-equipped venues such as concert halls and clubs (although it is not uncommon to find them in larger venues or open-air spaces). Over time, while the absolute weight of this category has consistently increased (as shown in Fig. 3), its relative significance has been eclipsed by the rapid growth of pop/rock festivals. Geographically, the concentration in municipalities along the

Mediterranean coast is remarkable, often enhancing and diversifying the cultural and touristic offerings of small cities during the summer season. Additionally, there are significant concentrations in the Basque Country and Catalonia, two regions where the demand for and consumption of this musical style have a longer-standing tradition.

The number of traditional/world music festivals has been increasing over time, with the 44 festivals studied being evenly distributed across the four specified periods and showing a significant increase over the last ten years. Nonetheless, similar to classical music, jazz/blues,

and flamenco festivals, their relative significance within the overall sample has decreased, as multi-style/urban festivals and particularly commercial pop/rock festivals have gained prominence. This specific category of festivals originally aimed at preserving the vibrancy of local cultures and providing enjoyable and direct interactions with other cultures through music. However, from the 1980 s onward, the format began to evolve as it sought to establish its own distinct identity. The music world split, and the “world music” style flourished in a period typified by examples such as *La mar de músicas* (1995) in Cartagena or *Xera Festival de Músicas del Mundo* (2018) in Jerez de la Frontera. Unfortunately, in mid-July 2023, the latter festival was cancelled following the municipal elections in May 2023. The Performing Arts and Music sectors are presently facing difficulties, with performances that receive funding or support from public administration being cancelled across Spain. This situation is predominantly attributed to political and partisan motives, following the rise to power of extreme right-wing parties in various municipal governments.

The category of multi-style/urban festivals is heterogeneous, bringing together many unconnected festivals that share the feature of not belonging to a dominant style. Some of these festivals focus on a certain instrument or theme, while others try to attract large and mixed audiences by offering a variety of activities. The diversity of their audiences inevitably makes these festivals

attractive to the private sector (Fig. 4), which sees the great potential and visibility of these events for sponsorship strategies. They are just as valuable in neoliberal urban marketing strategies when combined with place-branding. Indeed, in the latter scenario, this approach could serve as a strategy for viewing the ‘city as a container’ and, frequently, for positioning the city as a host of major cultural events. Beyond being a strategy for many local administrations, this is one of the most discussed issues through a range of disciplines such as economics, architecture, geography, sociology, and philosophy. Out of the 43 festivals included in this category, 22 have held fewer than 10 editions. The distribution across the three categories of urban settlements is nearly balanced, showing a clear preference for medium-sized cities in practical terms. Similar to the previous category, the institutional structure and artistic vision supporting each festival have influenced its future development. In December 2023, the Huesca City Council announced that the *Periferias* festival, which began in 2000, will not be held in 2024. The cancellation is due to the increasing influence of extreme right-wing parties within the local government. This decision marks the end of a prominent contemporary culture festival that had been a cultural beacon in a small provincial capital, with a population of 54,136 in 2023, for 23 years.

The final category is pop/rock festivals, which are undoubtedly the most prevalent and have experienced

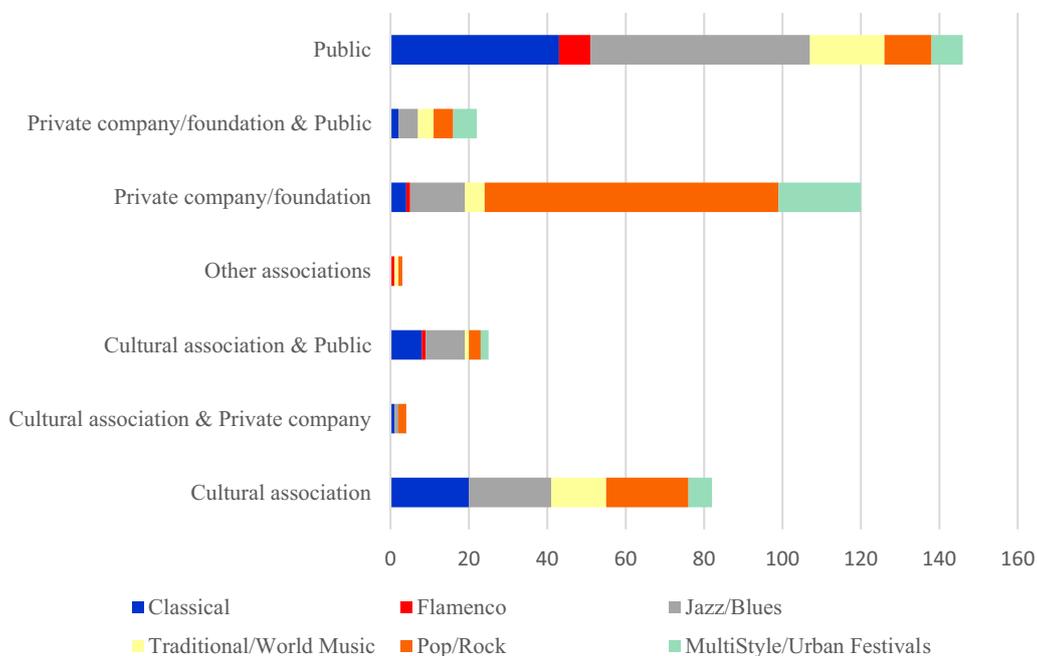


Fig. 4 Breakdown of festivals held in 2019 in small and medium-sized cities according to musical style and organizing institution Source: Authors’ elaboration based on a wide range of specialized websites

the most significant growth over the past decade. This expansion has been driven by technological advancements, shifts in music consumption models, and a crisis within the recording industry. Live concerts and festivals seem to be emerging as the best survival option for a large number of musicians. With the concert hall relegated to an almost subsidiary role, the general trend throughout Spain is toward festivals. These come in all shapes and sizes, but most popular is the summer festival—an artificial city for open-air music, active for a short period and with activities on various stages—as well as the concert cycle, also usually held in summer. The spread of these festivals has prompted many companies to evolve from service providers to festival promoters, establishing a public–private partnership with a city council (previously the exclusive organizer of musical events). Conversely, the emergence of this type of festival has played a role in the industry’s growth, explaining why more than 41% of the festivals examined (167 out of 402) have been held for only up to nine editions. Specifically, in the pop/rock genre, 108 out of the 119 festivals currently in existence were established in the twenty-first century.

According to the established timeline, the organizational structure and scale of pop-rock festivals have been evolving, trending towards more intensive formats characterized by a rapid increase in the number of simultaneous stages and performances. Essentially, these festivals embody large-scale models of music consumption, bolstered by financial contributions from various companies and commercial sectors, such as breweries, alcoholic beverage producers, mobile phone companies, banks, and supplemented by support and subsidies from public institutions. As can be easily inferred from Fig. 4, private enterprise is clearly dominant in two music styles: pop-rock festivals and multi-style/urban festivals. These

festivals derive their appeal and profitability from the large audiences they can draw and the economies of scale they achieve. Without a doubt, this model of music consumption has experienced the most significant growth in recent decades, revolutionizing the way we experience live music. Initially, not all of these events began as private ventures; in certain instances, cultural associations, sometimes in partnership with local town councils, initiated them (such as the *Viña Rock* festival). Their success, along with their ability to expand and establish themselves, often leads to situations where the administration is unable to manage the scale, prompting them to either tender the events or collaborate with professional companies to manage an increasingly competitive model. The truth is that, nowadays, it is not the authorities that exert pressure on private companies to adhere to various regulations; rather, the situation is reversed. Companies now threaten to relocate if their economic and logistical support requirements are not fulfilled. This is justified by the belief that a large-scale festival generates income wherever it takes place. The specific factors of scale and growth ambitions account for why private ventures are predominantly situated in medium-sized cities (59.5%). However, a significant 40.5% of festivals organized as commercial endeavors are located in smaller municipalities (refer to Table 4), where 51.3% of pop/rock festivals are being held.

Public administrations are the primary supporters of most classical music and jazz/blues festivals. This is especially evident in the cases of Public Patronages and Foundations. The former organizes two classical music festivals: the *Festival Internacional de Santander* and the *Semana de Música Religiosa de Cuenca*. The latter is responsible for organizing four classical music festivals: the *Festival Musical de Segovia*, the *Semana de Música*

Table 4 Breakdown of festivals held in 2019 in small and medium-sized cities according to organizing institution and municipal size

| Festivals according to organizing institution | Municipalities by population size | | |
|---|---|---|--|
| | Small cities/towns of between 10,001 and 50,000 inhabitants | Medium-sized cities of between 50,001 and 100,000 inhabitants | Medium-sized cities of between 100,001 and 300,000 inhabitants |
| Public | 73 | 37 | 35 |
| Private company/foundation | 49 | 33 | 39 |
| Private company/foundation & Public | 6 | 10 | 6 |
| Cultural association | 36 | 21 | 26 |
| Cultural association & Public | 17 | 4 | 3 |
| Cultural association & Private company | 1 | 2 | 1 |
| Other association | 1 | 1 | 1 |
| Total | 183 | 108 | 111 |

Source: Authors’ elaboration based on a wide range of specialized websites

Sacra de Segovia, the *Festival de Música Antigua de Gijón*, and the *León International Chamber Music Festival*. Additionally, they organize two flamenco festivals, namely the *Festival Internacional de Cante de las Minas* and the *Festival de Flamenco de Jerez*, as well as one folk music festival, the *Segovia Folk Festival*. One of the distinctive characteristics of the Spanish festival scene is the significant number of festivals that are owned and directly managed by the public sector (Table 4). To fully comprehend the development and activities of festivals in Spain, it is essential to examine the influence of municipalities and regional authorities in the cultural domain following the establishment of democracy. Since then, local and regional governments have become the primary source of financial support for festivals, often assuming ownership or providing funding for non-profit initiatives. Interestingly, the substantial economic and institutional reliance of festivals on these government bodies is not immediately evident when considering the official status of the festival organizations.

Cultural associations distribute their efforts relatively evenly among festivals of all styles (Fig. 4). When the organizational model merges cultural associations with public initiatives, classical music and jazz/blues festivals prominently emerge. This combination is most frequently observed in small cities/towns, accounting for 70.8%.

Examining the spatial distribution of festivals, as illustrated in Fig. 5, it appears evident that there is no strong correlation between the size of the population and the number of music festivals. There are certain cities where the concentration of cultural activity is part of their identity—Granada (7 festivals), Santander (6), Segovia (5), Vitoria (5), or Getxo (5)—while in other cases urban revitalization policies explain the rise of new festivals backed by cultural-led promotion policies (A Coruña, Cuenca, Cáceres, León, Lugo, Logroño, Girona, Gijón, Mérida, Santiago de Compostela, Valladolid, Vigo, etc.). The most vibrant and contemporary trend remains the geographical clustering of festivals within the primary tourist areas and destinations, often focusing on small urban municipalities with populations of less than 50,000 residents.

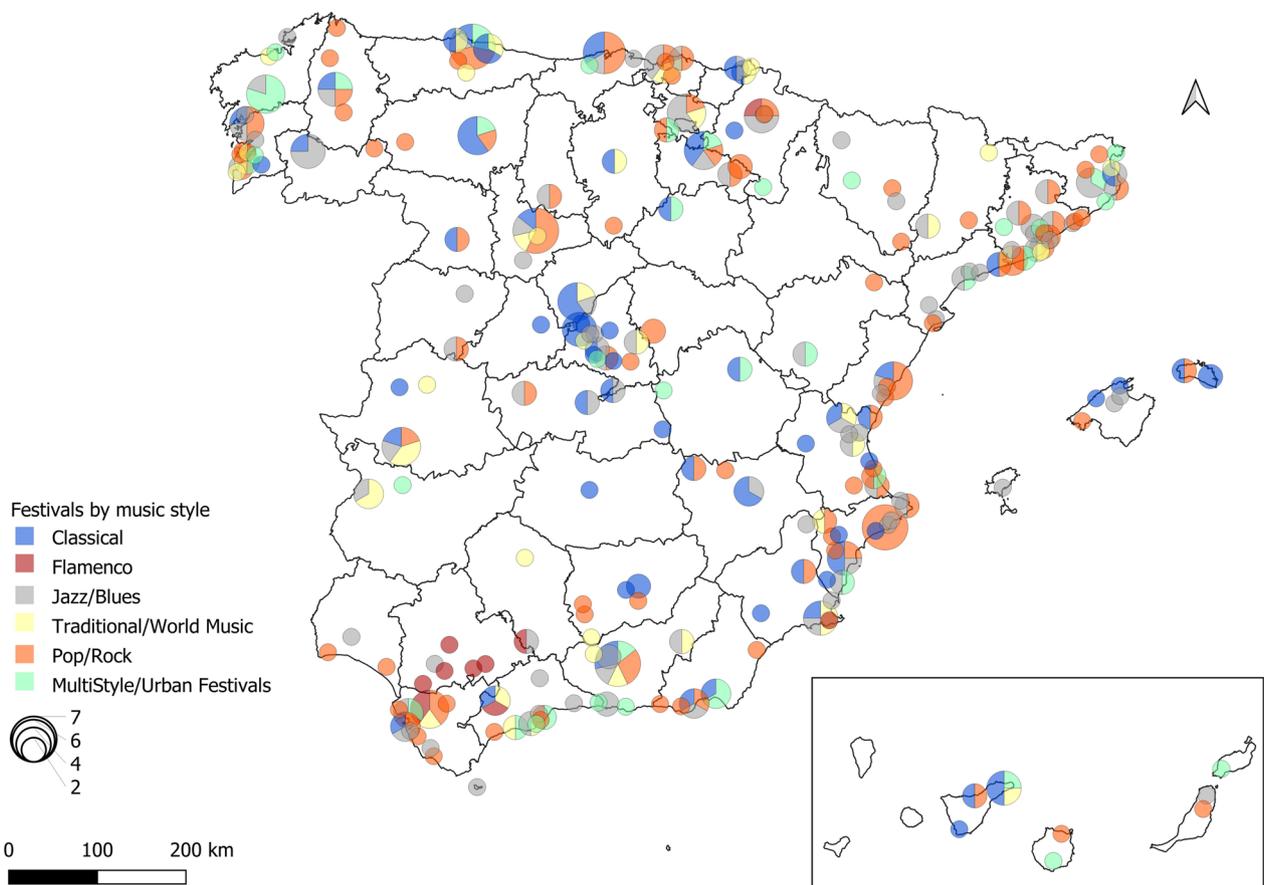


Fig. 5 Spatial pattern of music festivals in small and medium-sized cities by music style in 2019 Source: Authors' elaboration based on a wide range of specialized websites

Cities with a monumental historic core tend to host classical or jazz/blues festivals (Segovia, Cuenca, Aranjuez, Toledo, Lugo, Cáceres, etc.) and, more recently, urban multi-style festivals (e.g. Santiago de Compostela), taking advantage of venues and environments of special beauty and uniqueness. In metropolitan regions such as Madrid (Boadilla del Monte), Barcelona (Cerdanyola del Vallés), and Bilbao (Getxo), there appears to be a trend where municipalities with higher-income residents are more likely to host festivals featuring classical, jazz/blues, or traditional/world music. On the other hand, pop/rock festivals, which often come with negative externalities such as noise and disturbances, are typically held in metropolitan municipalities with relatively lower-income populations, such as Arganda del Rey and Granollers.

It is quite evident that Catalonia and the Valencian region host a substantial number of festivals, a trend that has been supported by public administrations at various levels. In 2017, the regional government, along with the Valencian Regional Tourism Agency, introduced the *Mediterranean Fest* brand to enhance the visibility and significance of the region's international music festivals. *Mediterranean Fest* has since become part of *Mediterranean Musix*, a brand established in July 2016 that encompasses all music festivals in the region, irrespective of their international reach or popularity. In 2019, the administration provided financial support totalling 700,000 euros under both brands. Meanwhile, the provincial administration of Castellón has used the slogan "Land of Festivals" and signed sponsorship contracts with several of the main music events. The town of Benicasim (18,192 inhabitants in 2019) brings together five festivals, three of them large-scale: *Rototom Sunsplash*, *Festival Internacional de Benicàssim (FIB)*, *Sansan Festival*, *Benicasim Blues Festival*, and *Festival de Música de Cámara Cordes a la Mar*. The first two attracted 202,000 and 115,000 attendees, respectively, in 2019. Within the same province, *Arenal Sound* attracted 300,000 attendees to Burriana (34,683 inhabitants in 2019). Further south, the town of Cullera (22,145 inhabitants in 2019) in the province of Valencia hosted the *Medusa Sunbeach Festival*, with a record 315,000 attendees in 2019. Moving south along the same coast, the city of Benidorm (68,721 inhabitants in 2019) is home to no less than seven pop/rock festivals (*Low Festival*, *Reggaeton Beach Festival*, *Funtastic Dracula Carnival*, *Iberia Festival*, *Fuzzville*, *Visor Fest*, and *Primavera Weekender*).

Significant clusters of festivals can also be found on the Costa Brava, the Malaga and Cadiz coasts, and the southern coast of Galicia. It seems clear that this pattern stems from a series of diverse causes that feed off each other, such as the touristic relevance of certain territories (and the capacity of festivals to attract visitors and diversify

the supply of tourist products) and the growing popularity of music festivals as leisure options among both local and international audiences. In the case of the Galicia region, *Fest Galicia*—a brand launched in June 2018 by the regional government to promote the territory as a music destination, supposedly under criteria of quality and social sustainability—currently brings together 14 Galician festivals and intends to jointly establish a strategic line of work that achieves economic benefits through collaboration between music and tourism.

Upon re-evaluating the last category under scrutiny, pop-rock festivals, it becomes clear that the concept of 'experience' is frequently employed in discussions regarding the success of these events. Music festivals have evolved into a distinctive, collective, and unparalleled experience. People attend because their friends attend; it is both an event and a socializing space in which the environment can be key to the success of the festival; in fact, many festivals are tied for life to a specific city, and some attempts to change their venue have ended in failure. In other cases, festival-goers are attracted by the festival itself (the program, the musicians, the setting, the atmosphere) rather than by the characteristics of the location. The festival is in such cases a destination in itself. Prentice and Andersen suggest that this character is part of the "experience of gregariousness" that can ultimately "be independent of any specific place or location... it is place-nonspecific" (2003: 12–13). Consequently, a number of festivals may be increasingly 'on the move'. This risk becomes particularly heightened when the original organizers step back or vanish, allowing multinational corporations to take charge. These major players on the music scene are not as attached to a place as the initial founders (cultural associations, collectives, public institutions, etc.) might have been. Therefore, the location of a festival may come to depend on corporate decisions rather than on an organizer's affiliation with a particular location, a convincing festival policy, or the unique characteristics of a city. Nicola MacLeod (2006) argues that the issue of 'placelessness' arises from the disconnect between festivals and the 'local community'. She claims that through tourism marketing and the adaptation of festivals to align with international standards and formats, these events are transformed into mostly trivial tourist attractions.

The onset of financialization processes in the world of live music—a selective metastasis that affects only commercial pop-rock and multi-style/urban festivals

Undoubtedly, one of the primary duties of the team of professionals responsible for organizing a festival is to concentrate on funding strategies, as well as the planning and management of expenditures and income

budgets. While financial considerations are invariably important, their significance may vary depending on the festival's mission and objectives (Bonet 2011). The character of a festival can vary greatly. Festivals whose main mission is *artistic* may privilege the purpose, among other logics, of showcasing daring works, musical styles, and repertoires of proven quality and rarely offered in a regular program; some festivals meet a *socio-territorial* logic in which factors of cultural development and social capital enhancement interact with aspects of strengthening local and regional identity, promoting tourism and the socio-economic regeneration of a disadvantaged or marginalized territory and thereby giving it notoriety and value; and then there are festivals whose dominant logic is that of *economic profit*, and these serve as clear examples of the economy of scale.

Pop-rock and multi-style mega-festivals follow the latter model, almost without exception, and although this is not a recent phenomenon, such festivals did not appear in Spain until the final decade of the twentieth century (*Sónar*, *Rototom Sunsplash*, *FIB*, *Viña Rock* and *Sonorama*). In 2022, five festivals exceeded the 200,000-attendee threshold (see Table 5) and eleven festivals crossed the 100,000 threshold. Globally, few businesses appear to be as profitable as the music festival business, according to projections from various sources, with music events market revenue expected to reach \$30.48 billion by 2023, with an annual growth rate of 5.06% between 2023 and 2027, resulting in a market volume forecast of \$37.14 billion by 2027. In its 2023 Yearbook, the *Asociación de Promotores Musicales* (Association of Music Promoters) in Spain reports that concerts, tours, and festivals have reached a record-breaking

Table 5 The 16 festivals with the highest attendance in 2022 (medium-sized cities in light yellow, small cities in bright yellow)

| Festival | Region | Attendees in 2022 | Concerts | City/Town | Duration - days | Year of the festival's creation | Number of editions by 2023 | Organizing company | Investing company |
|-------------------------------|--------------------|-------------------|----------|------------------------|-----------------|---------------------------------|----------------------------|-----------------------------|---------------------------|
| Primavera Sound | Cataluña | 500,700 | 672 | Barcelona | 11 | 2001 | 21 | Primavera Sound S.L. | Yucaipa Companies |
| Mad Cool Festival | Madrid | 310,000 | 149 | Madrid | 5 | 2016 | 6 | LIVE NATION | |
| Arenal Sound | C. Valenciana | 300,000 | 89 | Burriana | 6 | 2010 | 12 | The Music Republic | Superstruct Entertainment |
| Viña Rock | Castilla-La Mancha | 240,000 | 84 | Villarrobledo | 4 | 1996 | 26 | The Music Republic | Superstruct Entertainment |
| Rototom Sunsplash | C. Valenciana | 211,000 | 183 | Benicàssim | 7 | 1994 | 28 | Rototom S.L. | |
| FIB | C. Valenciana | 180,000 | 61 | Benicàssim | 4 | 1995 | 27 | The Music Republic | Superstruct Entertainment |
| Resurrection Fest | Galicia | 145,000 | 116 | Viveiro | 5 | 2006 | 18 | Bring the Noise | Superstruct Entertainment |
| Weekend Beach Festival | Andalucía | 135,000 | 100 | Torre del Mar | 4 | 2014 | 8 | Grupo Hermanos Toro | |
| Sónar Barcelona | Cataluña | 122,664 | 192 | Barcelona | 3 | 1994 | 30 | Advanced Music S.L. | Superstruct Entertainment |
| Sonorama | Castilla y León | 130,000 | 190 | Aranda de Duero | 5 | 1998 | 25 | Art de Troya | |
| O Son do Camiño | Galicia | 115,419 | 47 | Santiago de Compostela | 3 | 2018 | 4 | Bring the Noise & esmerArte | Superstruct Entertainment |
| Bilbao BBK Live | Euskadi | 115,000 | 108 | Bilbao | 3 | 2006 | 16 | Last Tour | |
| Cabo de Plata | Andalucía | 115,000 | 63 | Barbate | 4 | 2016 | 6 | Grupo Hermanos Toro | |
| Andalucía Big Festival | Andalucía | 112,000 | 43 | Málaga | | 2022 | 1 | LIVE NATION | |
| Dreambeach | Andalucía | 110,000 | 86 | Cuevas de Almanzora | 5 | 2013 | 9 | Grupo Hermanos Toro | |
| Cala Mijas | Andalucía | 107,000 | 59 | Mijas | 3 | 2022 | 2 | Last Tour | |

Source: Authors' elaboration based on *Anuario de la Música en vivo 2023* (Asociación de Promotores Musicales), data published in the media (Cruz, 1 February 2023), and websites of the festivals themselves.

net turnover from ticket sales, totalling €578,995,737, as stated in the Live Music Yearbook. The live music industry has reached a new milestone for the second year in a row, consolidating the recovery of the sector after a pandemic that forced the cancellation of both festivals and tours and the shutdown of concert venues for long periods. The figure obtained in 2023 represents a 26.07% increase in revenue compared to 2022, which closed with €459,248,129 and far exceeded the record set in 2019, which closed with €382,596,200 (Asociación de Promotores Musicales 2024). These figures are quite revealing, and when compared to the data provided by the Yearbook of the Spanish Authors' Society (SGAE) for 2022, it appears that mega-festivals, which made a comeback in 2022 after a two-year pause, have also achieved historic attendance records (SGAE 2023).

It is reported that Spain hosts approximately a thousand music festivals each year, generating an estimated impact exceeding 400 million euros. These figures position the country as a leading player in the global music entertainment industry. And foreign capital has seized this opportunity. This is the view of journalist Nando Cruz, who notes that “for me, the most symptomatic thing about 2023 is that American investment funds have continued to buy Spanish festivals, proof that they expect to obtain high profits” (Asociación de Promotores Musicales 2024). This growing attraction of foreign investors to Spanish festivals further underlines the country's consolidation as a global benchmark in the live entertainment industry.

While Barcelona and Madrid continue to hold their positions as the leading cities for the most popular festivals in 2023, other urban settlements across the country also host events that draw in thousands of attendees. Based on the attendance figures released for 2022, 14 out of the 16 festivals with the largest audiences took place in urban municipalities of the size described in this document. Of these, twelve were held in small cities, and two were in medium-sized cities.

In an era where economies of scale have made the live music industry highly attractive and lucrative, it is unsurprising to witness speculative trends leading to the creation of festival replicas in various regions across the country or even globally. Notable examples include *Sónar* and *Primavera Sound*. In the case of festivals originally tied to a territory, with a distinctive local personality and an institutional framework where local and regional stakeholders maintain a strong presence, as in the case of *Sonorama* in the small town of Aranda del Duero (33,626 inhabitants in 2023), the appearance of a replica (*Sonorama Ribera Ibiza*) is justified only by the notoriety of the festival's brand and the possibilities of attracting an international audience. This temptation seems to have been

unavoidable. The recruitment strategy used by the festival on its own website is enlightening: “*Sonorama Ribera Ibiza, the perfect cocktail between the holiday of your life and your favourite festival of the year. The event flies to the most modern and exclusive hotels in Ibiza.*”

Replicating a festival can be a strategy to generate income by leveraging a well-established and long-lasting network of partners and accumulated expertise. As Nando Cruz (2023a, b) rightly points out, the large-scale version of this cumulative strategy is best exemplified by Live Nation, a multinational founded in 1995 which—in addition to swallowing dozens of promoters in different countries and owning more than 200 concert venues around the world—today organizes more than 130 mega-festivals, including five in Spain. In 2009, Live Nation and Ticketmaster, a ticketing company, reached an agreement to merge, after which (2010) the resulting Live Nation Entertainment became a U.S.-based multinational entertainment company. The company promotes, operates, and manages the sales of live entertainment tickets in the United States and internationally.

The significant profitability of specific musical events has led to a gradual consolidation and increased interest from investment funds eager to claim a share of the benefits. Spain has also witnessed these strategic developments within the live music industry. In June 2018, media reported that an American investment group called Yucaipa Companies had acquired 29% of the shares of *Primavera Sound*. A week later, another U.S. investment fund called Providence Equity bought a majority stake in Advanced Music, the company that organizes the *Sónar* festival. This acquisition was led by Superstruct, a subsidiary of Providence Equity focused on the entertainment and music sectors. In June 2024, Superstruct was acquired by private equity giant KKR, a prominent international investment firm headquartered in the United States, providing solutions in alternative assets, including real estate, private credit, private equity, and infrastructure. Additionally, they offer services in liquid credit, capital markets, and insurance. Superstruct Entertainment now has more than 85 festivals in Europe and Australia, making it the second largest festival promoter in the world after Live Nation. The evidence indicates that not even the pandemic was able to slow the financial movements of large investment funds in a sector so lucrative as live music.

This situation justified a request to the European Parliament, which on 29 August 2023 received a question for written answer (Question E-002461/2023 to the Commission) on the topic *Concentration and competitiveness in the European live music sector, including ownership of festivals and ticketing platforms* (https://www.europarl.europa.eu/doceo/document/E-9-2023-002461_

[EN.html](#)). The question stated that five large companies (Live Nation, Superstruct, CTS Eventim, Vivendi, and AEG) own almost 150 music festivals in Europe, and that this concentration hampers the competitiveness of independent festivals and impacts the entire music ecosystem, because these large groups own stakes in several key areas along the music value chain including artist management, ticketing, and live distribution (venues as well as festivals). This ownership structure significantly distorts the ticketing market, leading to excessively high prices, and poses a substantial threat to musical diversity, particularly as programming becomes more standardized.

The music industry operates in a dynamic and rapidly evolving environment, making it challenging to create a long-term vision and conduct a forward-looking analysis that accurately reflects its diverse developments. In 2020, the report titled *Analysis of Market Trends and Gaps in Funding Needs for the Music Sector* (KEA European Affairs 2020) highlighted a notable rise in the number of concerts, festivals, and various events. This surge has led to an increase in headliner fees, which play a vital role in drawing audiences. Furthermore, the current economic concentration of the live music market endangers the very fabric of the live ecosystem, excluding smaller and more fragile players. Continued competition and concentration among festivals is creating a strained economic context, and a festival must now be almost fully booked to achieve a balanced budget or generate a profit. At the same time, grassroots music venues and small-to-medium-sized clubs are being threatened by more diffuse urbanization and by resulting local regulations that favour residents to the detriment of the night-time economy (KEA European Affairs 2020).

How is Spain positioned amidst the current wave of mergers and consolidations affecting the live music industry? The data indicates that Spain's situation in the mega-festival sector is largely similar to that of other countries. A close look at Table 6 shows that just three major investment companies dominate the market (Superstruct Entertainment, Live Nation and Yucaipa Companies) while six major promoters (The Music Republic, Bring the Noise, Sónar, Primavera Sound, Live Nation, and Last Tour) control the majority of Spain's mega-festivals—almost half of which are held in medium and small cities.

Following the acquisition of the *Viña Rock* and *FIB* festivals, the promoter The Music Republic, which established the *Arenal Sound* festival, now boasts a portfolio of nine major festivals: *Arenal Sound*, *Viña Rock*, *FIB*, *Granada Sound*, *Festival de Les Arts*, *Interstellar Sevilla*, *Madrid Salvaje*, *Metal Paradise*, and *Love the 90's Valencia*. The Music Republic first appeared in 2010 with the

launch of Burriana's *Arenal Sound*, a young festival that has since gained popularity among fans of urban music. The project was the brainchild of two Valencian brothers who have made an emporium of this brand, taking over festivals all around Spain (the most publicized being the purchase of the Benicàssim International Festival (FIB) in 2019). The Music Republic also operates as an artist management agency, organizes tours and events throughout Spain, and has its own creative agency to cover the business as a whole. Following the purchase of this company by Superstruct Entertainment in the summer of 2022, The Music Republic and Superstruct established in December of that year a new company (Free Music Alive, based in Valencia) to manage various events and shows.

Bring the Noise, a Galician promotional enterprise, oversees six festivals in the northern region in addition to *Resurrection Fest: O Son do Camiño*, *Caudal Fest*, *Tsunami Xixón*, *Sónica*, *Metal Paradise*, and *Morriña Festival*. All are situated in small and medium-sized cities. This enterprise has also been acquired by Superstruct Entertainment and merged with Advanced Music, S.L. (*Sónar*), The Music Republic, and Elrow Family under the umbrella of the large multinational. Meanwhile, the Basque promoter Last Tour is one of the few companies that has managed to maintain its independence to date. It organizes more than half a dozen festivals, including *Bilbao BBK Live*, *Azkena Rock*, *Cala Mijas*, *Donostia Festibala*, *Kalorama*, *Navia Suenas*, *BIME Live*, and *Santaspascuas*. Beyond the three promotion agencies already mentioned, and the cases of *Sónar* and *Primavera Sound*, there is also the Live Nation model, with five different major festivals, as well as DQG Barcelona A.I.E., which organizes multiple editions of a single festival—*Reggaeton Beach Festival*—across ten different locations, and BigFun Festivals A.I.E., with five different venues that replicate the same model (*Boombastic Festival*). The latter two are promotion agencies organized under the formula of Economic Interest Groupings (EIGs), a framework involving the regular participation of other companies outside the world of music (which by joining and making financial contributions can obtain significant tax exemptions).

The only remaining case to mention is that of the Granada-based company, Grupo Hermanos Toro. Its influence predominantly (though not exclusively) extends towards the south, with festivals such as *Weekend Beach Festival*, *Cabo de Plata*, *Dreambeach*, *Extremúsika*, *Zaidin*, *Wan Madrid*, *No sin Música*, *Animal Sound*, *Bull Music*, *Primavera Trompetera*, *Puro Latino*, *SierraSur*, etc. The argument presented by Nando Cruz (2023a, b) highlights a critical observation in the contemporary landscape of festival organization. As the number of festivals proliferates, often orchestrated by

Table 6 The concentration of festivals in the hands of Spanish promoters and their ties with investment funds

| Investing company | Company promoting the festival | Festivals |
|---------------------------|--------------------------------|---|
| Superstruct entertainment | The Music Republic | Arenal Sound Viña Rock FIB Granada Sound Festival de Les Arts Interstellar Sevilla Madrid Salvaje Metal Paradise Love the 90's Valencia Luce de Benicàssim Brava Madrid |
| Superstruct entertainment | Bring the Noise | Resurrection Fest O Son do Camiño Caudal Fest Tsunami Xixón Metal Paradise Morriña Festival |
| Superstruct entertainment | Sónar (Advanced Music S.L.) | Sónar in the following cities: Barcelona, Lisbon, Istanbul, Reykjavik, Hong-Kong, London, Sao Paulo, Hamburg & Tokio |
| Yucaipa companies | Primavera Sound | Primavera Sound in the following cities: Barcelona, Porto, Madrid, Los Ángeles, Sao Paulo, Buenos Aires & Santiago de Chile |
| Live nation | Live Nation | Mad Cool Andalucía Big Festival Barcelona Beach Festival DCode A Summer Story |
| | Last Tour | Billbao BBK Live Azkena Rock Cala Mijas Donostia Festibala Kalorama Navia Suena BIME Live Santaspascuas |
| | DQG Barcelona A.I.E | Reggaeton Beach Festival in: Avilés, Marina D'Or, Madrid, Benidorm, Mallorca, Barcelona, Marbella, Santander, Nigrán & Tenerife |
| | BigFun Festivals A.I.E | Boombastic Festival in: La Morgal (Llanera), Rivas-Vaciamadrid, Gran Canaria, Alicante & Málaga |
| | Grupo Hermanos Toro | Weekend Beach Festival Cabo de Plata Dreambeach Extremúsika Zaidín Wan Madrid No sin Música Animal Sound Bull Music Primavera Trompetera Puro Latino SierraSur |

Source: Authors' elaboration based on data published in the media (Cruz, 1 February 2023) and on the websites of the music promoters

a limited number of dominant companies, the uniqueness and individuality of these events may diminish. This phenomenon, humorously described as the “phantom of cloning” (Cruz 2023a, b: 193) suggests that festivals may begin to lose their distinctiveness, becoming mere replicas of one another. This trend raises important questions about creativity, diversity, and

the preservation of cultural identity within the festival industry.

These major corporations employ intricate management strategies to enhance the visibility and profit margins of each festival, employing increasingly advanced tactics, including among others: (a) securing sponsorship agreements to provide additional revenue and reduce

overhead expenses. Various companies, such as breweries, soft drink manufacturers, mobile phone operators, and banks, are often eager to sponsor music festivals as a means of advertising and enhancing their brand visibility. They may choose to display their logos on stage or even associate their brand name with the festival itself; (b) merchandising sales; (c) agreements with suppliers—the various companies that rent space at music festivals to sell food, drinks, and other products are a source of income, but they also lower cost arrangements with the various suppliers; (d) design and development of marketing plans to attract a wider or more profitable audience; (e) implementing price segmentation strategies to optimize the pricing of both daily and full-festival tickets, thus ensuring early liquidity; and (f) offering VIP packages, with activities and services within the festival grounds that justify higher ticket (and season ticket) prices.

Discussion and conclusions

Having reviewed, organized and analyzed the data collected in our database on music festivals in small to medium-sized cities in Spain, we are now prepared to address the research questions initially presented in this paper, with varying levels of detail. The initial question was whether it is possible to speak of dynamics of festivalization for Spanish medium-sized cities collectively, and if so, what the chronological sequence would be. The answer to the initial inquiry is both clear and assertive. This holds true whether we perceive festivalization as the swift increase in the number of festivals held annually over the past three decades, or if we regard it as the use of the festival model to format live music events. The numerical evidence is overwhelming: out of the 402 festivals held in 2019, merely 89 were present in 1995. This implies that 77.8% of the festivals have been established in the past 23 years, whereas it took 56 years (from 1939 to 1995) to achieve the count of 89. The pace of this growth has not only quickened over the past two decades but has also remained largely unaffected by the financial and real estate crisis that began in 2008.

Clearly, our database captures only the festivals that were active in 2019, representing a snapshot of that year. However, it has significant limitations, as it does not account for all the festivals that were established during the same timeframe and have since been discontinued for various reasons. To address this limitation, we must depend on newspaper libraries or archival sources, as no publicly available database compiles this information. Indeed, this has been a significant issue that has constrained research efforts and shaped this initial exploratory approach to the realm of music festivals in medium-sized cities. There is a lack of reliable

information on the topic, and certainly none concerning the urban scale necessary for our project. The information gathered by the Center for Documentation on Music and Dance (INAEM-State Secretary of Culture) is directly supplied by the organizers without any requirement to subscribe to this service. Additionally, it is only included in the yearbooks at the regional level.

Considering these initial constraints, we have decided to develop an alphanumeric database using specialized secondary sources, such as music festival networks and websites categorized by musical styles. This has been supplemented by an examination of the websites of the cities included in our sample analysis. The process has been time-consuming and resource-intensive. Regrettably, the information obtained has significant shortcomings. Specifically, we have only been able to gather data on the attendees of each festival in a limited number of instances. Moreover, there is a complete lack of transparency regarding the budgets, including both income and expenditure distribution. Nevertheless, the extensive data gathered has allowed us to understand not only the timeline of each festival's evolution but also the artistic vision, the institutional framework, and the seasonal trends. This information is further enriched by the municipality hosting each festival, or at least its main venue, depending on the size of the municipality. With all of this, we have not only conducted an initial descriptive statistical analysis but also mapped the spatial distribution of music festivals in small and medium-sized cities. This brings us to the third research question: Can location spatial patterns and city profiles be distinguished, what is the role of territory?

The answer is yes, though with certain reservations. Initially, we can identify three general categories: (1) medium-sized cities that hold the status of being provincial or regional capitals, offering services to territories of varying scales. These cities have implemented culture-led regeneration strategies and/or urban policies. Their spatial distribution is more spread out, mirroring the historical urban network with its rich heritage, encompassing material, symbolic, and meaningful dimensions (Rausell-Köster et al. 2022). In this context, festivals—particularly those focusing on classical music, jazz/blues, or a variety of styles—contribute to the preservation and generation of new cultural meanings; (2) medium-sized cities within metropolitan regions, where the socio-economic status and income levels of their residents influence the choice of festival locations, adhering to specific segregated socio-spatial patterns. Events featuring 'prestigious' musical genres like classical music and jazz/blues are typically hosted in municipalities with higher income levels. Conversely, musical styles associated with mainstream pop/rock music styles are usually organized in areas with

lower income levels; and (3) coastal tourist destinations, mostly located on the Mediterranean and known for their sun and beach attractions, have employed festivals as a strategy to broaden and diversify tourism. These events have the potential to draw both local and international visitors, thanks to their excellent connections to national and international transportation networks.

Regardless of the situation, it is crucial to highlight, as other authors have mentioned, that the size of a municipality does not appear to significantly influence the number of festivals held, as cities of similar size display different traits in this regard. Nevertheless, it has been noted that in smaller cities most festivals are held during the summer months. In most larger cities, events are typically spread out throughout the year, yet festive activities are predominantly scheduled between spring and autumn.

If we follow the rationale of Lluís Bonet (2011), the criteria that shape and define the personality of a festival and its organization model can be summarized into four main categories, the interaction of which results in the idiosyncrasy of each proposal: the territory, the institutional framework involved in inception and development, the budget, and the artistic project. As discussed above, the data used in this paper have limited the ability to explore the issue of budgets in depth. However, we can still derive some preliminary conclusions regarding the first two categories. Beginning with the concept of territory, this pertains to the festival's location and encompasses both the notion of situation (relative space indicating a changing position over time in relation to other locations, allowing for the establishment of functional connections) and site/venue (absolute space corresponding to a specific, fixed location within the local topography or urban fabric). The territory, from a geographical reading, is a non-renewable, complex, and fragile asset with unique ecological, cultural, and heritage values—a place of symbolic social and cultural interaction, shaping the identity and developmental potential of the festival. The relationship between the physical place and the different communities (residents and visitors) interacting with the festival is very important and can also be read in terms of resilience (Derrett 2008). The role of place-identity and a sense of community constitute the glue that ensures the cultural uniqueness of some festivals.

The second conditioning factor is institutionality, which covers issues such as holding ownership, governance, organizational values, management model, stakeholders, or participation in social networks, among others. Unlike classical music or jazz/blues festivals, which are primarily controlled by public entities, contemporary popular music festivals are significantly influenced by profit-driven private initiatives, both in terms

of organization and artistic production. This factor influences the level of public support, the growing involvement of private sponsors, the total revenue generated by the festival (encompassing not just ticket sales, but also sales of food, beverages, and merchandise), and consequently, the overall budget for each festival. Broadly speaking, while festivals run by non-profit organizations (cultural associations, private foundations...) tend to be small in size, those run by highly professional private companies have much larger budgets and sophisticated and aggressive fundraising strategies, contributing to the emergence of large-scale Spanish mega-festivals. Certainly, exceptions to this rule can be identified, such as the renowned and long-established classical music festivals that were founded or supported by public institutions between the 1930s and 1950s (*Quincena Musical de San Sebastián*, *Festival Internacional de Santander*, and *Festival Internacional de Música y Danza de Granada*). Additionally, jazz and blues festivals like *Jazzaldía*, which began in the 1960s, are also exceptions. The identities and reputations of these festivals are closely linked to local cultural policies and city branding strategies. In each of the four cases, the festivals are closely connected to the cultural infrastructure and symbolic capital of the city, which has not prevented these festivals from committing themselves in recent years to moving their productions to other venues and cultural spaces within the city and/or extending their activities to other venues in the region.

Conversely, it is important to remember that Spanish festivals are notably characterized by their significant economic and institutional reliance on local and regional governments. This characteristic is not readily obvious when examining the official status of the festival organizations. For instance, the *Quincena Musical de San Sebastián* is a private entity established in collaboration with three public partners: the City Hall, the Gipuzkoa Provincial Council, and the Basque Government. These partners offer financial assistance to support a management team consisting of eight members, which also benefits from funding provided by the Ministry of Culture. In 2019, the income was distributed as follows: 55% from public funding, 32% from ticket sales, and 12% from sponsorships.

Apparently, the interrelationship between the first two factors—territory and institutionality—results in the identification of two extreme types: situated cultural initiatives and practices (such as festivals deeply rooted and anchored in a specific area) and spatially unbounded festivals (exhibiting extractive behaviors without any territorial commitment). Clearly, in between these extremes are a wide range of possibilities, as well as festivals born as situated cultural proposals run by cultural associations

and/or local institutions whose success has drawn the attention and interest of commercial companies and investment funds—a scenario that has radically shifted their mission, values, and management models (the *Viña Rock Festival* -est. 1996-, *Sonorama Ribera* -est. 1998-, and *Resurrection Fest* -est. 2006- would be good examples of this type of process). The former type is mostly dominated by classical, flamenco, jazz/blues, and traditional/world music festivals, while the latter consists almost exclusively of pop/rock and urban multi-style festivals. The high profitability of many of these festivals—which have not been free of failures and inefficiencies—explains why foreign investment funds have turned their eyes in this direction in recent years (mainly multinationals or U.S. investment funds). In the case of medium-sized cities, the favourite locations of these commercial festivals are mostly cities with a clear cultural-heritage tourism profile (multi-style festivals) and municipalities on the Mediterranean coast (pop/rock festivals) that are well-connected to air transport and able to attract an international audience.

These preliminary findings allow us to address the second part of the research questions, which pertain to the financialization dynamics within the live music industry. Have the financialization processes impacted all music festivals uniformly, or have they been more focused on those with unique artistic projects and specific types of cities? The answer is elucidated in the description provided in the preceding paragraph.

To reach these preliminary conclusions, we have relied on alternative sources beyond those typically employed to describe and analyze the festivalization process. In this case, our methodology, does not involve building an alphanumeric database. Rather, it involves reading, extracting, and interpreting information from professional yearbooks of music promoter associations and the business sections of various newspapers, which have documented acquisition and merger activities in the industry since the beginning of this century. This information has allowed us to track the restructuring efforts within the Spanish live music sector and to recognize the arrival of major multinational companies and foreign investment funds. These major players are drawn by the sector's high profitability and share mutual interests with platform economies associated with tourism. The expansion of the mega-festival model, which emerged just over ten years ago, is being driven by these new investors. Since its inception, this model has pursued a large-scale format, prioritizing economic profitability over the prominence of the music itself. Thus, this aligns with the answer to the final question raised: What is the role of the institutions involved in the organisation of the festival? It is a challenging question for which we have yet to discover a

straightforward answer, due to the number and diversity of actors involved, as well as the unique characteristics of each context. Every festival is distinct, and the number of actors and interactions differs in each instance. From major multinational corporations and investment funds to artist management agencies (such as Live Nation, a global entertainment company providing services like ticket sales, resale, exchange, concert production, marketing, and artist management), local promoters, service firms, and, of course, the public administration, which provides subsidies and logistical support for commercial festivals. The Administration's involvement in each situation will be determined by their perspective on these events and whether they are more likely to back large commercial festivals for revenue and tourism purposes, or if they prefer to support the right to cultural access by funding local projects.

Undoubtedly, the live music and festival industries are facing globalization-inspired challenges similar to other creative industries, and the impact of global live music promoters on local markets has indeed gained the attention of some scholars (Brennan 2011; Huijgh and Evens 2012; Soffer 2018). Some of these researchers argue that, while the leading global promoters of live music (such as Live Nation) have provoked changes in the structure of the (Belgian) festival scene, their powerful share and position have also stimulated rather than threatened local talent and tempered rather than raised ticket prices (Huijgh and Evens 2012). Research of this nature remains outstanding in Spain, as no studies have yet explored this matter, not even for large cities, let alone medium and small ones.

Soffer's view is more critical, arguing that the popular music festival industry is lucrative and has become an intense battleground. He maintains that rivalry is propelling the music festival, fuelled by rising attendance and monopolization of the commercialized festival industry, as well growing demand for live music, which has led to significant increases in ticket pricing. Nevertheless, the major risk of conglomeration is loss of uniqueness. The corporate model is expected to generate standardized global experiences, which may diminish the distinctive local atmosphere that many individuals desire in a city. This local atmosphere can be characterized as the city's unique vibe (Soffer 2018). To combat the effects of homogenization, festivals have implemented various networked branding techniques. These include logo design and branding strategies in the city, as well as promotional videos, festival playlists, and live radio transmissions. Both Nunes and Birdsall have described all of this as a 'shuffle' logic used to frame contemporary festival organization and experience design (Nunes & Birdsall 2022). As a positive counterbalance, the smaller, long-term,

non-commercial festivals are likely to thrive because they will retain their distinct uniqueness (Soffer 2018). In any case, the scenario is complex, and the stakeholders are powerful, so wisdom and resilience will be needed to preserve the identity of each festival and allow it to evolve, and to transform a model that is moving toward the most blatant extractivism into one that is committed to festivals favouring cross-fertilisation within their own urban settlement—at least in the case of those firmly rooted and committed to their own territory. We are discussing urban festivals, which are not just events taking place within cities but are celebrations that honor the cities themselves. These festivals are complex and diverse, yet they share a common focus on urban identity, lifestyles, and values.

The data and evidence gathered in this contribution show that many small and medium-sized cities consider music festivals to be a valuable asset to culture-led urban policies, both in the pursuit of urban regeneration/local development goals and in their repositioning and diversification as tourist destinations. Many have adopted active music festival policies, which is part and parcel of the trend of instrumentalization of urban cultural policies (Hitters and Mulder 2020). In this paper we explored the Spanish music festival dynamics in small and medium-sized cities. Following Paula Guerra, these dynamics have the function of globalization coding, marketing and culture of media coverage, mobilizing thousands of actors on the supply side, in mediation and on the demand side (2016: 39). There are several elements that prove this in Spain: unprecedented evolution in the number of festivals over the past three decades; the spread of festivals throughout the urban network, especially in its Mediterranean coast and in metropolitan area settings; the exponential increase in the number of festival-goers; the weight of the turnover of the festivals in the statement of accounts culture and cultural industries; the importance of festivals for the launch and projection of the bands; and, above all, the tendency to arrange live music gatherings in a festival-like way, even in cities where no fine-grained infrastructure of music venues exist and the image of cultural vibrancy is particularly poor.

Some scholars have asked the question: What should be the purpose of a festival? Their answer is that it should not offer the same 'menu' that is already available in the concert halls of a particular locality during the rest of the year. Even less should it serve as a way for management agencies to accommodate all the artists they are conducting on scheduled tours. Nor should a dense, tightly compressed program be allowed to become a catch-all, without selection or reflection. The ideal festival proposal should complement the musical offer for the rest of the year, dare to include new and emerging names, take a

chance on unusual repertoires, show itself as a thermometer of new trends, take risks, and above all offer a coherent proposal, rich in transversal references in the context of a schedule woven together with a congruent common thread.

During the Covid-19 outbreak, festival organizers had to struggle with the challenges of the pandemic, striving to maintain contact with the public and other stakeholders (Richards and Leal 2022). Perhaps it is now time to focus on the impact of music festivals in terms of urban sustainability (ecological footprint, nuisance, noise and environmental damage, poor working conditions for some staff, cultural inclusion, etc.) (Quinn et al. 2020; Oliva and Colombo 2022), always bearing in mind debates about scale and the implications of cultural events on urban transformation and competition for public space (McGillivray et al. 2022; Richards 2024). It is worth remembering that mega-festivals are inherently unsustainable. A sustainable mega-festival does not exist, as over two-thirds of the carbon footprint associated with such events is due to public travel. Any business model that relies on the movement of thousands of individuals—such as conferences, fairs, festivals, major sporting events, and tourism in general—is environmentally unsustainable. However, efforts can always be made to explore alternatives and strategies to reduce their unsustainability.

The extent to which the plethora of festivals has enriched the urban cultural fabric in small and medium-sized cities remains unanswered. This research gap prevents us, at time of writing, from assessing the correlation between music festivals and the emergence and/or strengthening of a network of cultural spaces, entities, collectives, initiatives, circuits, and companies scattered throughout the built-up area; in short, the question persists as to what extent music festivals can be drivers or levers of territorial development and, more specifically, contribute to the achievement of smart, sustainable, and inclusive growth of a territory shaped by small and medium-sized cities.

Our further research directions will shift from conducting exploratory comparative analyses to undertaking detailed case studies. This switch of scale will begin with the proposal of an urban typology tailored for small to medium-sized cities that host music festivals. By selecting a sample of cities based on this typology, we aim to conduct a thorough examination of the distinct characteristics and dynamics of each city in two specific ways. Firstly, this approach will enable us to investigate the potential interactions between the festival and the city's cultural framework, encompassing physical, human, and economic dimensions. Secondly, it will allow us to delve into the spatial aspects of the festival, covering both its

concrete and abstract components. This involves identifying infrastructures, facilities, spaces, symbols, and meanings, as well as tracking their evolution throughout the festival's existence.

Acknowledgements

We wish to express our heartfelt appreciation to the anonymous reviewers for their meticulous evaluation of our manuscript and for their constructive comments and suggestions. Their valuable insights and expertise have been instrumental in improving the quality of this work, and we are deeply grateful for their time and dedication.

Author contributions

Conceptualization, C.V.-V.; methodology, C.V.-V. and D.B.-T.; formal analysis and mapping, C.V.-V. and J.M.-N.; data curation, J.M.-N.; writing—original draft preparation, C.V.-V.; writing—review and editing, C.V.-V. and D.B.-T.; project administration, D.B.-T.; funding acquisition, D.B.-T. All authors have read and agreed to the published version of the manuscript.

Funding

This article has been prepared as part of the project "Culture and Territory in Spain: Processes and Impacts in Small and Medium-Sized Cities" (Ref. CSO2017-83603-C2-2-R), funded by the State Research Program "Development and Innovation Oriented to the Challenges of Society" of the Spanish Ministry of Economy and Competitiveness, under the State Plan for Scientific and Technical Research and Innovation, 2013-2016. The views expressed herein are solely those of the author(s) and do not necessarily reflect any official position, policy or determination of the aforementioned institution.

Availability of data and materials

The datasets built, used and analysed during the current study are available from the corresponding authors upon reasonable request.

Declarations

Competing interests

The authors declare that they have no competing interests. The funder had no role in the design of the study; in the collection, analyses, or interpretation of data; in the writing of the manuscript; or in the decision to publish the results.

Author details

¹Department of Geography and Spatial Planning, Universidad de Castilla-La Mancha, Cuenca, Spain. ²Department of Geography, Universidad Autónoma de Madrid, Madrid, Spain.

Received: 11 July 2024 Accepted: 24 May 2025

Published online: 21 June 2025

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