

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

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Abstract

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

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

1 Introduction

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

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

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

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

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

2 The emergence of live music policies

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

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

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

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

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

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

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

3 The rise of the Dutch festival industry

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

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

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

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

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

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

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

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

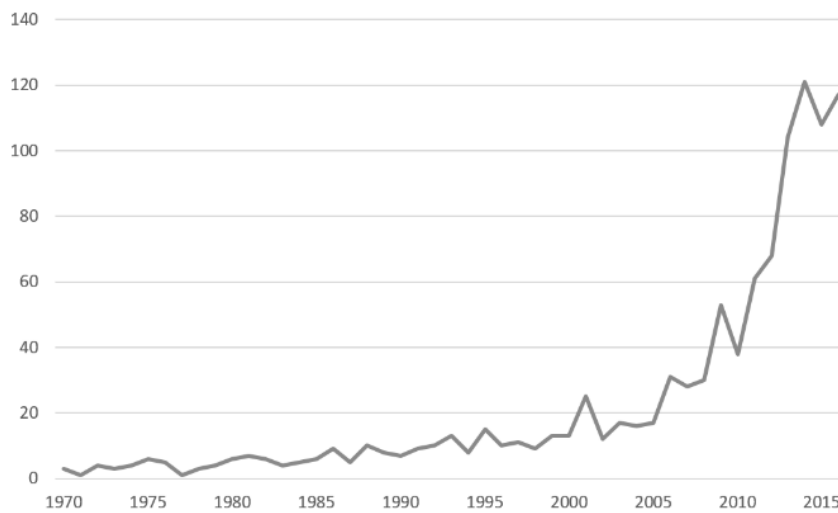


Figure 1: Annual market entry of all the Dutch music festivals that took place in 2016 (n=1,070). Source: Festivalatlas 2016 (Van Vliet 2017)

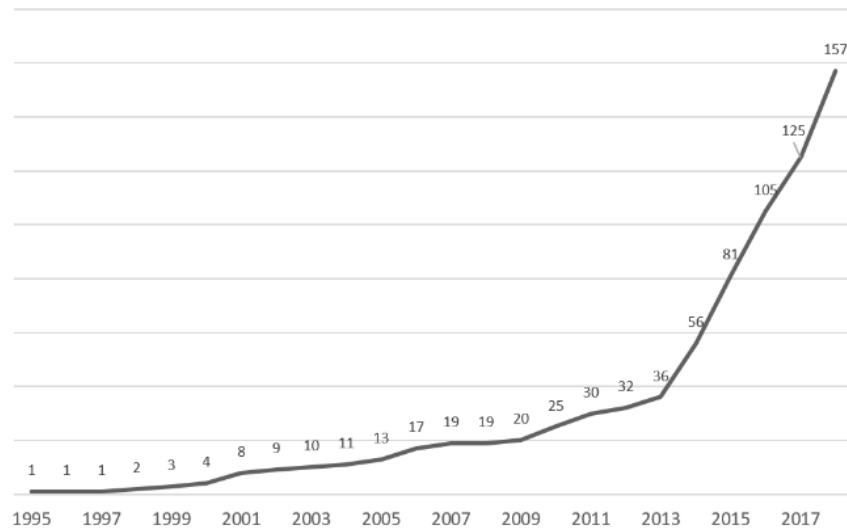


Figure 2: Cumulative use of the term festivalization (in Dutch: festivalisering) in Dutch national and local news media between 1995 and 2018. Source: Nexis Uni 2019

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

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

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

Table 2: Five phases of the Dutch festival history

4 Live music policies in three Dutch cities

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

4.1 Amsterdam: Challenging festivalisation

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

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

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

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

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

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

4.2 Rotterdam: Programming the city

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

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

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

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

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

4.3 Utrecht: The venue as festival site

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

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

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

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

5 Conclusion

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

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

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

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

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

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

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

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

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

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