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Under Pressure but Still Standing

Festival Economies:
Balancing Costs, Creativity and
Responsibility Across Europe

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Introduction

It's about friends and community

“Many people dream of two things: to have their own café, and to have their own festival. (...) So then I decided to invite my friends and we just organized a tiny festival with 100 visitors, just our friends.”

Whether they celebrate their 3rd or their 33rd edition in 2026, most of the festivals interviewed for this report share surprisingly similar origins. A group of friends, sometimes with little or no experience of the music sector, decides to bring people together around music. A garden party becomes a local event. Volunteers become teams. Hundreds of people become thousands, until “the garden party grew so big it got out of control”.

What started as a gathering often gradually turns into a community. Throughout the interviews, organisers repeatedly described festivals as collective projects rooted in shared values, friendships and a strong DIY spirit. Some organisers wanted to answer social and cultural needs they perceived locally. Some wanted to support local scenes, or simply to create the kind of event their territory did not offer.

It's about unity

«It's like Christmas, they come every year. They come with their families. And now the families have their own families. It's a family festival, it's about identity, it's about folk music, it's about summer, about beach, about having fun and being in this creative space where everybody has a chance to express themselves.»

Beyond music, festivals are repeatedly described as temporary worlds where people come together and everyday divisions are suspended, if only for a few days. Others spoke about creating spaces where people who would otherwise rarely meet could share something together. One organiser

remembered a particularly polarised period and the sight of six hundred people having fun with each other during a concert: “That’s our superpower”, they concluded.

It's about music, people and place

“my kind of music, with my kind of people”

Yet, what emerges from the interviews is that festivals are rarely just about music. They are about a peculiar combination of music, people and place. Each event is shaped by its surroundings and by the communities that bring it to life. Whether they take place in city centres, on islands, on farms, by lakes or in national parks, organisers all describe the same challenge: building temporary worlds from scratch. Stages, campsites, accommodation, food, lighting and infrastructures all need to come together for a few days after months of preparation. This report explores the conditions under which these temporary worlds are made possible.

Methods and sample

This report is based on sixteen semi-structured interviews conducted with festival organisers across Europe, in collaboration with national live music networks. Rather than aiming at statistical representativeness, the research adopts a qualitative and inductive approach inspired by ethnographic traditions and grounded theory. Interviews were approached as individual case studies reflecting specific local realities, while allowing recurring themes and shared experiences to emerge progressively from the material itself. Following a grounded theory approach, coding categories were developed inductively, with a special focus on the language, metaphors and examples used by participants, in order to remain as close as possible to their lived realities.

Code	1st edition	Country	Duration
FEST_01	2022	Belgium	3 days
FEST_02	1997	Belgium	2 days
FEST_03	1997	Belgium	2 days
FEST_04	2015	Estonia	2 days
FEST_05	2016	Norway	3 days
FEST_06	2014	Norway	4 days
FEST_07	2011	Italy	3 days
FEST_08	2011	France	2 days
FEST_09	2022	Switzerland	3 days
FEST_10	2003	Norway	4 days
FEST_11	2009	The Netherlands	4 days
FEST_12	2011	The Netherlands	4 days
FEST_13	2023	Italy	3 days
FEST_14	2014	Switzerland	6 days
FEST_15	2012	Hungary	3 days
FEST_16	1993	Estonia	4 days

Festival teams range from all volunteers to 15 full-time permanent employees.

Budgets range from 60 000€ to 3,5M€.

Audience visits range from 1500 to 40 000 visitors over the whole event.

Main pressure: Festival economies

It's about (im)balance

“So we started with little money that we believed that was enough, but it wasn't enough. Because all the costs increased incredibly and every year the costs are still continuing to increase. So all the prices doubled in the last three years and we can't double the ticket prices. And that's our problem. So our profit is getting less. We sell more and we have more sponsorships. But the profit is going down because we can't fight with this.”

Festivals are often judged through visible indicators of success: attendance figures, sold-out editions, growing audiences or expanding programmes. However, the interviews reveal a more complex reality. Across Europe, organisers repeatedly described a paradox: the very factors that signal success can also generate new pressures. More people require more infrastructure. More activities require more staff. Larger programmes generate higher artistic and production costs. Even increases in public support are often absorbed by rising expenses elsewhere. For many festivals, the challenge is not to grow anymore, but to maintain a workable balance between ambition, accessibility, identity and sustainability.

It's about income

“And we don't rely on the support of the government. So that's it. We don't have any money from them. So we have to get big.”

One of the striking findings of the interviews is that there is no such thing as a standard festival economy. No two budgets look alike. Some festivals rely heavily on public support, while others receive little or none. Some describe sponsorship as a major pillar, while others depend primarily on bars or food and beverage activities. Yet despite these differences, most organisers describe their economic models less through accounting categories than through a combination of complementary resources.

Ticketing was almost always mentioned among the

first revenue streams. Depending on the festival, it may represent 40%, 50% or up to 70% of total income. Bars and food activities were also described as central pillars of festival economies. In some cases, bar revenues rival ticket sales themselves. Others explained that food is part of the identity of the festival, even when working with local producers leaves little room for profit.

The place occupied by public funding varies considerably from one festival to another. If it occasionally stands out as an economic pillar to some festivals, many other consider that public contribution is insufficient, especially in the midst of growing uncertainty. Several organisers ranked public funding at about 5% of their overall budget: “we have regional money but it's kind of a small amount, because it's 800€ this year and the budget is 850 000€.” The public contribution then covers “one hotel room” where festival representatives would hope the amounts could help support a new stage, a riskier programming, a bigger headliner or the labour costs of permanent staff. Instead, one of them notes “so we have very little public funding, like, it's ridiculous how little public funding we have. We had 2 900 euros from the municipality last year! Well, you can buy the recyclable cups with that.”

Beyond the amounts of the subsidies themselves, organisers also stress how public support means more than money itself, pointing that subsidies provide credibility, reassure partners and sometimes facilitate access to additional funding. Multiannual agreements were particularly valued, reducing uncertainty and making planning easier.

Sponsors, donations, food stalls, merchandising, camping, project grants, bar revenues, venue rentals or side activities were all mentioned as complementary resources. More than any individual source, viability appears to lie in diversification. As one organiser put it, festivals survive by “eating from several troughs”.

Economic Archictures

Each festival was asked to rank its three main sources of income and expenditure. The staircase displays these rankings, from the largest to the third largest budget item.

	Income		Expenditure	
FEST_14	Bar		Infrastructure	
		Sponsors	Programme	
		Ticket sales	Labour	
FEST_16	Ticket sales		Labour	
		Public funding	Artists	
		Sponsors	Infrastructure	
FEST_15	Ticket sales		Programme	
		Sponsors	Infrastructure	
		-	Labour	
FEST_13	Ticket sales		Labour	
		Public funding	Infrastructure	
		Donations	Programme	
FEST_12	Ticket sales		Programme	
		Public funding	Labour	
		Sponsors	Infrastructure	
FEST_11	Ticket sales		Labour	
		Public funding	Infrastructure	
		Donations	Programme	
FEST_09	Ticket sales		Infrastructure	
		Bar and food	Programme	
		Sponsors	Labour	
FEST_03	Ticket sales		Programme	
		Bar and food	Labour	
		Public funding	Catering	
FEST_01	Ticket sales		Programme	
		Bar and food	Infrastructure	
		Sponsors	Bar and food	

It's about costs

“Every year I think there is between 20 or 30% of increasing of everything. We also increase tickets every year. It's a lot. It's really a lot.”

Asking festival organisers about their three biggest expenses always leads to different answers. Yet, **artistic costs** were among the most frequently mentioned challenges throughout the interviews, with envelopes reaching up to 400 000€. For many festivals, artist fees represent close to one third of total expenditure. But programming costs extend far beyond the lineup itself, with flights, hotels, local transport, catering, technical riders and backline all contributing to what several interviewees described as a **growing inflation of expectations**. Some festivals introduced strict fee ceilings in response to the growing demands of artistic teams.

Production and infrastructure then emerged among the largest expenditure categories. Sound, lights, stages, electricity, fences, seating, roads, accommodation and logistics all represent substantial costs, especially in a context where equipment and standards once associated with major international acts are now increasingly expected throughout the sector, leading some interviewees to describe a form of “production gigantism”.

Transport and logistics also emerged as major sources of uncertainty. Fuel prices, flights, accommodation and catering have all increased significantly in recent years, with several organisers linking these developments to post-pandemic disruptions, inflation and the consequences of the war in Ukraine.

Labour costs have also become a growing source of pressure (up to 200 000€ in a festival benefiting from a year-round team). Some festivals explained that staffing had now become their first budget line, with regular staff wages, technical crews, security staff and specialised freelancers all represent increasing costs, while labour shortages and growing wage pressures (by law or by request to go “beyond cultural wage”) have pushed some expenditures upwards.

More pressures: Global constraints

It's about the sector

"In terms of sector, it's true that for us it's more complicated to have an exclusivity on artists. Especially if they're going to be booked in a big festival... And it's logical, we're not the priority. So, of course, we feel it. (...) I would say that it forces us to make the effort to do everything very early. So the booking of artists starts much earlier than what we did before. And we see that from one year to another, it evolves very quickly."

Several testimonies suggested that growing imbalance in the economic models of the festivals were tied to the overall evolution of the live music sector. A first hint addresses the **growing market concentration**, with the rise of bigger players directly impacting the possibilities for smaller festivals to secure their programme. Participating festivals have mentioned:

- a much earlier booking process (up to 2 years before the festival) to try to secure a bigger act;
- the rise of exclusivity clauses, leaving some festivals out of options when a larger event operates nearby and applies national exclusivity clauses or clauses per kilometers;
- the development of a negotiation process with bigger festivals, which ends up in a position of "authorizing" an artist to be programmed elsewhere.

Organisers also pointed out a **shift in touring habits**, noting that numerous artists tend to favour fewer but better-paid performances, and try to optimize their touring routes as much as possible. In that context, bigger festivals, especially when implemented close enough to a massive transportation hub, tend to win over smaller, harder to reach festivals. Several testimonies also mentioned that **travelling habits are also evolving**, with bands being more and more likely to fly instead of traveling with their own vans, with two direct consequences over festival organisers: additional logistical responsibilities, and additional costs due to the now needed backline and local transport.

On top of it, many interviewees noted a **growing gap between headliners and smaller acts**: while the first tend to become more expensive financially and technically, emerging bands try to get a spot by accepting degraded performing conditions, with close to no artistic fee. One organizer explains that bigger projects now sell the opening slots to emerging bands: they rent the slot on stage, the dorms on the tour bus, the spot at the merch table... To emerging bands that invest on these tours, in a pay-to-play logic.

Furthermore, another player in the sector morphology has been identified as a **new form of competitors**: the Arena shows and large one-off concerts. For audience with limited time and cultural budgets, these events can represent a comfortable alternative to the festival experience, which is particularly challenging in countries with lower purchasing power. Several organisers pinpointed this specific type of competition as a strikingly unfair one, underlying that Arena shows benefit from permanent infrastructure and simpler logistics, when festivals create an entire temporary environment... but that tickets to both event cost roughly the same price.

It's about the crowds

"There's no water and food on the other islands, so we have to provide water and food. (...) they get back in a long queue, to get on the boats, to get back to the main island. And then they haven't eaten for like five, six, seven hours. That will do something to the audience, especially if they have to wait too long, the weather is bad, or something like that. You have the psychological factor also you have to consider when you are out there. It's not just to go to the shop and buy something because the shop isn't there. There is no escape."

The Arena shows example underlines that festivals may also compete with the idea of convenience, comfort and proximity that can be tempting for larger portions of festival audiences. Indeed, a two-

hour concert, sometimes closer to home or easier to access, may be perceived as a simpler choice than a 3-day festival that requires travel, accommodation and time off-work. The idea of **changing expectations** from the audience kept coming back in the interviews, with organisers describing requests for better food options, more diverse catering, higher-quality infrastructure regarding comfort and hygiene, and an overall family-friendliness that is also sought for.

These growing expectations seem to go along with a **changing ticketing habits**, with ticket sales happening later than before, making attendance harder to predict and hence, adding to the financial stress of the organisers. This example seems to be particularly acute for outdoor festivals, which reported an increased dependence on weather forecasts, especially the very last week before the event where up to a third of their tickets sales happen. Many festivals also reported a switch in the topic of crowd management, with a **visible switch between safety and security**.

They explain that prevention and care are often more effective than enforcement, and that they increasingly rely on mediation teams, awareness staff and reporting systems on top of traditional security crew. Sexist and sexual violence prevention, safe-space initiatives and particular attention to vulnerable groups such as minors, young volunteers or isolated audience members are described as becoming standard practice.

It's about the authorities

"So you cannot have a freelancer work like three or four days a week for your company. It's a kind of protective law, but it's not really well worked out for our company. It's a law that is coming from the construction sites or the hospitals or the transport business. But it's not working well for the arts and crafts industry or the festival industry."

Funding uncertainty was another recurring concern. Several organisers pointed to changes in tax policies, VAT rates and cultural legislation, as well as political transitions and institutional reforms that can alter priorities and create uncertainty around future support schemes.

Beyond the question of funding itself, many interviewees described **growing administrative**

complexity. Public support increasingly requires applications to multiple bodies rather than a single source, forcing festivals to simultaneously address culture, tourism, local development and other policy areas. Applications, reporting requirements and evaluation procedures represent a growing workload, to the point that some organisations now rely on dedicated staff to navigate funding systems and public administration.

In addition, organisers described festivals as being **governed by multiple layers of authority**. Municipalities, regions, emergency services, police forces, cultural administrations and elected representatives all intervene at different stages of the process, often with distinct priorities and expectations. Authorisations, permits and regulatory requirements therefore imply constant negotiation and coordination, making festivals particularly dependent on long-term trust and dialogue with local authorities.

Beyond formal procedures, several organisers stressed how much **the future of a festival can depend on a handful of individuals**. One interviewee recalled losing the necessary authorisations only one week before the event, despite thousands of tickets already being sold. Similar dynamics emerged regarding relationships with local residents. **Noise complaints remain a reality**, particularly in urban or residential contexts, yet most organisers described them as relatively limited. Several festivals actively invite neighbours to attend the event, hoping that a better understanding of its purpose will foster acceptance, seeing these relationships not as occasional crisis-management tools, but as essential conditions for the festival's long-term sustainability.

Several organisers also question the role of festivals as **political spaces**. They either report increasing requests to host political, social or advocacy activities, or growing pressure to take a clear stand over broader societal issues. While some of the organisers reckon that political engagement is part of the DNA of their festival, others are more cautious about taking public political positions. Overall, questions of neutrality, visibility and representation were described as increasing difficult to navigate.

It's about nature

"because of the rain, we just lost 100,000 euros."

The majority of the interviewees reported **weather as becoming an operational risk**. Droughts, storms, heavy rain and heatwaves were all mentioned as growing concerns, with two festivals from the panel having already proceeded to a full-on evacuation. Organisers hence describe how they had to implement crisis-management meetings entirely dedicated to weather forecasts, in order to anticipate possible evacuation procedures, schedule changes or early site closures. On top of operational constraints, **weather has also become a financial liability**: in addition to the impact on ticket sales, bad weather can also lead to people leaving early and hence purchasing less food and beverages, which are an important revenue stream in most economic models. This growing pressure hence leads festival to aim for a larger financial security nest to be able to cope in case of a climate-related event, or to seek specialised insurance coverage, since it has now become a recurring risk rather than an exceptional event.

At the same time, **environmental responsibility** increasingly appears as an integral part of festival management. Interviewees described efforts to reduce waste, limit unnecessary travel and source food locally, while paying closer attention to resource consumption and environmental impact.

Several festivals also highlighted the **need to coexist with the ecosystems surrounding them**. Organisers raised questions about the impact of events on birds, mammals and other species living close to festival sites, acknowledging that these effects remain difficult to assess precisely. In some cases, environmental considerations have even contributed to limiting the size or development of festivals, illustrating how ecological concerns increasingly shape not only how festivals operate, but also how far they are willing to grow.

Even more pressures: individual challenges

It's about the workload

"If we wanted to hire someone, it would definitely make things easier, because at some point volunteer teams start to run out of steam. Even with a new project like this one, it's clear that, in the long run, if we don't get structural support to have someone working half-time year-round, or something along those lines, it will stop eventually, that's for sure."

Festivals tend to run on mixed workforces, with festival teams often relying on a combination of permanent staff, freelancers, seasonal workers and volunteers. In this context, the balance between paid and unpaid work varies considerably from one festival to another, with some participants relying fully on volunteers and other being highly professionalised structures. On that note, most of the festival representatives that participated in that research themselves display a portfolio career, combining their festival work with other professional activities throughout the year.

While **volunteers remain essential to the feasibility of festivals**, being the operational backbone of the event, several organisers also point out the limits that come along this specific workforce: training, supervision and support are essential, and an acute attention to the responsibilities that weight on their shoulders. Interviewees have repeatedly underlined that some missions, especially regarding safety and security, should absolutely remain in the hands of paid and trained professionals.

Continuity then emerged as a fragile resource. Many festivals still rely on a small number of individuals holding a considerable amount of organisational knowledge and long-standing relationships with partners, funders and local communities. Staff turnover can therefore disrupt years of accumulated experience, while recruiting and training new people for key positions was repeatedly described as a challenge. In volunteer-based organisations in particular, continuity was often considered one of the greatest assets.

It's about timeline

"There is a kind of temporal precarity and constant pressure weighing on those involved, which is highly stressful, especially in a cultural context that is becoming increasingly austere."

Another recurring observation throughout the interviews was the **mismatch between the duration of the event itself and the amount of work required to make it happen**. Organisers described how spending an entire year preparing an experience that lasts only a few days can sometimes feel overwhelming, with **money, work and responsibilities being concentrated** into a very short period: "we have one year to get the €700,000. And all of that, we use in one week." Last-minute ticket sales, weather uncertainty and operational demands further compress decision-making timelines, creating situations where an entire year of preparation seems to unfold at once.

This long preparation cycle is made even more challenging by the fact that **planning often happens before certainty exists**: artist bookings, subsidies, sponsorship agreements and ticket sales all operate on different timelines, forcing organisers to commit to expenses before knowing their final level of income. Several interviewees explained that they sometimes have to secure artists long before funding decisions are confirmed, describing festival management as a continuous exercise of anticipation and contingency planning, where multiple scenarios have to coexist until the very last moment.

It's about risk

"Know that currently, we sell 70% of our tickets two weeks before the festival. So it's huge. It's a big... A big risk, and so we organized ourselves this year to come and look for answers to this risk, as much weather as consumption habits."

Public funding, sponsorship, ticket sales and even weather conditions remaining unclear until relatively late in the process, the feeling of uncertainty has been particularly recurrent across the interviews. Financial commitments, however, cannot wait. Artist fees, infrastructure and operational expenses frequently need to be secured long before revenues are guaranteed, making long-term planning particularly difficult in a context shaped by political, economic and sectoral volatility.

Several interviewees then stressed **how quickly a seemingly healthy situation can become fragile**. One festival nearly went bankrupt after accumulating significant debt, while others described major deficits resulting from a single difficult edition. One describes the versatility of its expenses over the years: “expenses peaked in 2019 (€130,000), fell to €30,000 in 2021, went back up to €70,000 in 2022, and have since stabilized to €45,000 per edition, a sustainable balance.”

Economic balance was therefore rarely seen as something achieved over the course of one festival cycle. Rather, organisers described it as something built over many years, with successful editions often used to create reserves capable of absorbing future shocks. In that sense, selling out an event was not necessarily associated with financial comfort, but sometimes with the minimum level of stability required to continue.

Against this backdrop, **risk management itself** appears to have become a profession. Organisers described increasingly sophisticated budgeting, forecasting and monitoring procedures, with some assigning responsibility for specific budget lines and closely tracking expenditure throughout the year. New initiatives are often assessed not only according to their artistic value, but also through the lens of risk and financial sustainability. Several interviewees portrayed festival management as a constant exercise in balancing ambition with prudence.

It's about stress

“Well, everyone working in this sector is passionate about music, events, or both. And if that's not there anymore, you start wondering what you're actually doing. But it does happen sometimes, in the middle of the festival or while setting everything up, that we ask ourselves: what are we doing in all this frenzy? We don't sleep. And all of this so that people can have fun, while our bodies pay the price. So, yeah, we do wonder how long we can keep doing this. Especially when it's all voluntary. We're stretching an entire team of volunteers to the limit as well.”

Beyond budgets, logistics and regulations, most organisers described a **strong personal attachment to music, culture and community-building**. Passion was repeatedly presented as the reason why people remain involved despite increasingly difficult conditions. Several interviewees openly questioned whether festival work would be sustainable without this emotional connection, suggesting that the social and cultural impact of festivals provides a sense of purpose that goes far beyond financial considerations.

Yet passion also has its limits. Sleep deprivation, long working hours and physical exhaustion were mentioned throughout the interviews, with several organisers wondering how long they could continue at the same pace. Some described relying heavily on volunteers, friends and family, creating additional feelings of responsibility and sometimes guilt.

Several spoke about living with a **constant sense of responsibility and uncertainty**, portraying festivals as high-risk projects where many crucial factors remain outside their control. Alongside this pressure, many interviewees expressed feelings of frustration when trying to reconcile economic realities with the values that initially motivated their involvement. Others spoke of growing emotional fatigue within the sector, fuelled by concerns about bankruptcies, market concentration and the future of festivals more generally.

Facing pressures with strategies

It's about experimentation

*"We have been discussing in our festival, you know, should we just stop? Should we just become an ordinary festival? Because **it's not financially viable** to do all those things that we do. I don't know."*

Festivals kept being described as spaces for experimentation, testing and learning. Some even referred to their organisations as social and cultural incubators, arguing that festivals offer a rare opportunity to explore alternative ways of organising culture, communities or local economies.

This process often relies less on formal planning than on **trial and error**. Programming, audience development, or sustainability initiatives are constantly adjusted from one edition to the next, with many organisers stressing that successive festivals have taught them more than any strategy document ever could. This spirit of **experimentation also extends to organisational models**. Many structures operate beyond a single annual event, developing concert series, venues, educational programmes, artist development schemes, cafés or booking activities. Rather than being perceived as secondary, these different activities were often described as complementary, with portfolio approaches helping organisations strengthen their resilience and maintain a year-round presence.

In this sense, **festivals were frequently portrayed as nodes within broader cultural ecosystems rather than standalone events**. This broader perspective also influences the way they think about development itself. Experimentation was not always associated with growth, and several interviewees described deliberately limiting the size of their festivals, decentralising activities or redesigning their models in response to social, environmental or organisational concerns. In these cases, choosing a different path was not perceived as a failure to grow, but as a conscious strategy.

It's about partnering up

"And so, yeah, well, so local food, local producers, as much as possible to reduce both waste, but also the travel and all the expenses to bring actually the produce to the festival, and lots of recycling and so forth, right? And keeping the money locally, you know? We're not sending all our money to Cayman Islands. You know, we're trying to keep it in the... A local circular economy."

Pooling and mutualisation were frequently mentioned in the interviews, with organisers mentioning borrowing equipment, sharing infrastructures and relying on informal networks with other festivals and venues. Several interviewees emphasised the importance of reusing materials and exchanging resources whenever possible, while others expressed interest in developing **stronger cross-border cooperation** to mutualise artists, production costs or technical elements. In some cases, sponsors themselves contribute through services, equipment or in-kind support rather than direct financial contributions.

Partnerships often extend beyond the cultural sector, with local farms, recycling initiatives or composting projects being regularly evoked, with many organisers describing relationships based less on rigid procurement procedures than on dialogue, pragmatism and shared values. Keeping money circulating locally, reducing waste and supporting local economies were all frequently mentioned as guiding principles. In addition, interviewees highlighted the importance of looking beyond the music sector itself. Construction companies, accessibility organisations and educational institutions were all described as valuable sources of inspiration and expertise. As one organiser explained, many challenges faced by festivals are not unique to culture, and learning from other sectors can open new paths for collaboration and innovation.

Festivals also described numerous collaborations with youth organisations, cultural associations and community groups. Some involve young people in technical work, stage management or prevention activities, while others rely on local organisations to reach audiences they sometimes struggle to engage directly. Beyond practical support, these partnerships were often described as bringing new energy into the project and strengthening ties between festivals and their territories.

It's about strategies

“So it's very important that we have a good saying, a good name, a good brand out in the world. And we are so lucky that we have the New York Times saying we are one of the festivals we have to visit here and the Lonely Planet. one of 10 festivals we have to visit this year in Europe. So we are in a good place right now. And now we're sold out so people are desperate to get tickets. So we can ask too much. So we are in a good position. But this must always end like that. As I told you, the festival was nearly bankrupt for two years. So the wind is turning very quickly.”

Building a strong identity emerged as one of the most valuable assets for participating festivals. A good reputation was repeatedly associated with audience loyalty, earlier ticket sales and stronger resilience during difficult periods. Several organisers described the importance of offering something distinctive rather than competing directly with mainstream festivals. For some, this meant cultivating a particular atmosphere, creating narratives around the place itself or offering artists experiences that go beyond financial considerations. Others highlighted the benefits of long-term consistency, with audiences buying tickets even before line-ups are announced. **Reputation itself becomes a form of security**, although several interviewees warned that success should never be taken for granted.

Legitimacy, however, takes time. The importance of trust and consistency, whether with local authorities, neighbours, media or audiences was frequently remarked, with a note that festivals often need to gradually prove their value, edition after edition, before becoming accepted and recognised. Another core strategical lever seems to rely within the added-value that festivals can offer to their sponsors beyond simple visibility. **Sponsors and**

partners are no longer only looking for logos on posters, but also for experiences, networks and opportunities to build relationships. Business clubs, sponsor gatherings, backstage experiences and tailor-made events, following a 360° design, were all mentioned as ways of attracting new sponsors. The latter now increasingly have their own “party within the party”, which requires dedicated projects and significant amounts of work from the festival team.

Indeed, many interviewees described a sponsorship landscape that has become increasingly competitive and fragmented. Budgets are smaller, commitments shorter and expectations higher. Long-term partners are therefore particularly valued, while many festivals rely on combinations of financial support, discounted services and in-kind contributions. Some organisers deliberately favour independent or value-driven partners over larger commercial actors, while others admitted becoming increasingly cautious, knowing how difficult lost sponsors are to replace. As one interviewee explained: “We have to be strategically fixed, but tactically flexible.”

Ultimately, strategies are often about compromises. Several organisers described continuously adjusting ambitions to available resources: reducing artistic budgets, postponing infrastructure projects, simplifying technical production or adapting programming choices. Some have changed locations, formats or artistic orientations in order to stabilise their models. Others mentioned keeping «red buttons» in reserve, hoping they won't have to use them. Yet these emergency solutions often come at the cost of identity, which explains why many organisers described compromise not as abandoning their vision, but as constantly trying to protect what matters most.

It's about speaking up

“At the end of the day, a festival runs on beer sales and gambling addicts...”

Many interviewees pointed to **persistent misconceptions** regarding how festivals are funded, organised and sustained, arguing that the sector needs to communicate more openly about its economic realities and organisational challenges. Similar observations emerged regarding audience members but also public authorities, with organi-

sers expressing that policy-makers do not always grasp the fragility of festival organisations or the specific challenges they face. Several interviewees described repeatedly having to explain these issues to decision-makers, highlighting that external reports, advocacy initiatives and sector-wide studies were often seen as providing legitimacy beyond individual concerns.

Several participants argued that important aspects of the live music ecosystem remain largely hidden. Topics such as artist fees, sponsorship models, financial structures, working conditions and pay-to-play practices were frequently mentioned as examples of areas where **greater transparency** would be beneficial. Better information-sharing was often presented as a prerequisite for more informed decisions across the sector.

More broadly, several organisers suggested that **festivals should be recognised for more than their entertainment value**, since the cultural, social and economic infrastructures that the festivals represent do contribute to local communities, experimentation and innovation. In that sense, better storytelling was often presented not simply as a communication exercise towards funders, policy-makers or the general public, but as a strategic necessity.

Facing pressures with meaning

It's about the DNA

"We have always tried to focus a lot on gender diversity in the lineups. Like we've been praised for it a lot, even before it really became a mainstream or mainstream, like a bigger topic. Because we felt that it was never difficult to find good female artists."

Maintaining the identity of the festival was often presented as a priority, even in contexts of financial pressure or uncertainty. Some interviewees explicitly stated that they would rather reduce the scale of a festival, or even stop altogether, than fundamentally change what it stands for. Numerous financial decisions then seemed driven by a broader mission rather than the growth of the festival alone.

As stated in the introduction, many festivals were originally created around a given artistic, cultural or social vision, and **this sense of purpose continues to shape their development**. Some organisations prioritise musical discovery, experimentation or underrepresented genres rather than mainstream success. Others focus on cultural transmission, regional identities, linguistic diversity or local heritage. Programming choices were often described as reflecting long-term values rather than short-term market considerations, with several organisers emphasising the importance of maintaining consistency between what a festival says and what it does.

This vision also influences everyday decisions, with sustainability, accessibility, local sourcing and inclusion-related activities being portrayed not as additional activities, but as **extensions of the festival's identity**, operating as integral parts of their mission rather than being sheer responses to external pressure.

Finally, many organisers described **ambitions extending far beyond the festival itself**. Artist development programmes, youth initiatives, coaching schemes, environmental education, community engagement and cultural transmission were all

mentioned as ways of creating longer-term value. Several interviewees see their festivals as contributing to broader social, cultural or environmental transformations, and success was often measured not only through attendance figures, but also through lasting impacts on artists, audiences and territories. As one interviewee put it, festivals are also about "planting seeds" that may continue to grow long after the event itself has ended.

It's about environment

"So we ask our audience to donate two euros. And for every two euros, we plant a tree in Iceland. And so we, I don't know, around 4,000 trees, I think, we've planted. And we do it every year. So that's quite, because we calculated that we could set off all the carbon footprint from the audience, but also the artists. like all the travel and the mobility. But it feels also strange. We just sort of, okay, we pay this and then we have some trees planted and it erases all the things we've done. But at least it's something. And of course we are very much like all the artists that are like closer to 700 kilometers from here. We ask them to take the train and we only have vegan or vegetarian food. And we also try to be mindful when working with partners that we also tell them, okay, can we maybe have no single-use plastics?"

The importance of **measuring environmental impacts** rather than relying solely on certifications or general commitments was regularly touched upon across the interviews. Material flow analyses, waste monitoring and environmental reporting were frequently described as valuable tools for decision-making. Quantifying resource use often helped festivals identify unexpected sources of waste and prioritise actions accordingly. Environmental strategies were therefore often presented as evidence-based and iterative rather than symbolic.

Environmental thinking came back as part of everyday management rather than a separate project. It has been described as shaping everyday decisions

(preferring local suppliers, collective travel, vegetarian or vegan catering and circular-economy approaches) regarding the regular operations of the festivals and their teams. In the meantime, environmental concerns are also increasingly integrated into both contractual and information relations with artist, partners and audience members, who are formally required to compel (green riders, reducing food waste, eliminating single-use plastics, using reusable tableware and composting systems...) suggesting that environmental action is not only about reducing harm, but also about creating positive impacts.

It's about inclusion and accessibility

"We always were attending the festival. We are people who go to the festival, we organize it. And we saw a different approach in the festival, less human, more about the profit. And we, in a certain way, wanted to change this direction. We saw also in our region, Puglia, that is a region full of festivals, that we are losing humanity and proximity for big bands and big acts and big costs and incredibly rising cost of the tickets. So the music is not anymore for anyone but just for... we can buy the tickets. So we want to change this direction and we want to make the music and above all experimental music and discovery music accessible for people."

Accessibility then emerged as a sanctuaried objective, but also as a growing challenge. Many festivals reported actively debating ticket prices every year, trying to reconcile financial sustainability with affordable access. In response, many festivals are experimenting with different pricing models. Early-bird tickets, student discounts, low-income tickets and mixed free/paid formats were all mentioned as ways of maintaining accessibility while adapting to increasing costs. Some explicitly rejected the idea of using audiences as a "credit card" to compensate for financial pressures, hence setting a "psychological ceiling" regarding a ticket price that they won't exceed.

Several interviewees also described **inclusion** as extending far beyond audiences themselves. Youth engagement programmes, volunteering initiatives and partnerships with community organisations were frequently mentioned, while some festivals described specific efforts to involve young people

facing social difficulties or exclusion. At the same time, many organisers acknowledged that there is still considerable progress to be made regarding accessibility. Collaborations with disability organisations, consultations with accessibility advocates and dedicated projects were frequently mentioned, with several festivals actively exploring ways to improve the experience of people with reduced mobility, hearing impairments and other disabilities.

Going back to the core of their purpose, many organisers highlighted efforts to improve **diversity** within festival programming, with gender balance frequently mentioned as an objective that has become increasingly embedded in booking practices. Some also stressed the importance of showcasing artists from different cultural, linguistic and geographical backgrounds, as a natural extension of festivals' wider commitments to openness, diversity and inclusion.

Conclusion

It's about it all

“Then we have an enormous increasing of costs, difficulties to find volunteers, difficulties with the freelancers, higher prices but also freelancers who stepped out of the industry (...) so it was difficult to come back but we managed! We managed.”

One recurring observation throughout the interviews was that **pressures rarely remain confined to a single area**. Rising artist fees, exclusivity clauses, inflation or declining purchasing power do not simply affect budgets. They influence programming choices, staffing decisions, infrastructure investments and long-term planning all at once. Organisers repeatedly pointed out that solving one issue often means creating new tensions somewhere else. A larger audience requires more infrastructure. More professionalisation increases labour costs. Raising ticket prices may protect finances but undermine accessibility. Festival management therefore often resembles a continuous search for balance, where every decision sends ripples through the rest of the organisation.

Interestingly, some organisers acknowledged that the **dynamics they experience at one level are sometimes reproduced at another**. Exclusivity clauses provided a striking example. Festivals affected by restrictions imposed by larger events sometimes apply similar mechanisms to smaller neighbouring festivals. More broadly, competition was frequently described as operating across multiple scales, with pressures cascading from the top of the ecosystem down to smaller organisations. What appears as a survival strategy for one actor may become a constraint for another.

This **growing interdependence** was visible across many dimensions of festival life. Economic uncertainty can postpone accessibility projects, limit investments in sustainability or reduce the ability to respond to legal disputes. Rising costs, volunteer shortages, labour market changes and environmental constraints were often described less as

separate problems than as layers of the same reality, reinforcing one another in unexpected ways. In that context, resilience is no longer understood as the ability to solve one problem at a time, but as the capacity to live with several forms of uncertainty simultaneously.

It's about music?

“We notice that we have a good part of the participants who come for the music, but also a good part who come for the place and who expect the music as a support, let's say.”

Festivals seem to be increasingly expected to do more than present music. Environmental issues, social justice, accessibility, mental health and wider societal concerns were all mentioned as areas where festivals are now expected to engage. While many organisers embrace these responsibilities, some also questioned how many additional missions festivals can realistically absorb.

Despite growing expectations, music remains the reason festivals exist in the first place. Organisers repeatedly emphasised that artistic programming sits at the core of their projects, with all other activities supporting, rather than replacing, this primary mission. Yet, many festival representatives describe a growing fraction of their audience being rather attracted to the atmosphere, the setting, the community or the overall “festival bubble”, requiring festivals to balance different expectations. In addition, the cascading pressures primarily jeopardize the programming itself, gradually narrowing the room available for artistic risk-taking and forcing difficult choices between ambition and affordability.

It's about shared responsibility

"I would say access to the market is the main problem and access to free competition. You know, most of the channels that we use to communicate with our audience now is driven by these big players, Meta, you know, TikTok. And, you know, it's hard. It's hard for a small player to know all the algorithms because they're changing all the time. And also, the bigger you are, the more lucrative you're, you know, you have more leverage in negotiations."

In the end, the broader responsibilities that lay on festivals may sometimes exceed the capacities of individual organisations. Many argued that these issues require collective responses rather than festival-level solutions alone, calling for stronger leadership from public authorities and regulatory bodies. Interviewees often called for clearer incentives, stronger public policies and long-term political engagement, expressing frustration at being expected to address systemic challenges through individual organisational choices. This is where networks, alliances and advocacy initiatives were repeatedly presented as essential tools for the future. Knowledge-sharing, cooperation and collective representation were seen as ways of addressing challenges that no organisation can tackle alone. The interviews also highlighted the existence of practical, financial and organisational limits. Rather than becoming bigger, many expressed a desire to become more stable. Ultimately, the challenge appeared not so much to be one of growth, but of building enough resilience to continue investing in the future.

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