

Internationalization Strategies in Music Festivals

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Abstract

The internationalization of music festivals is a very recent and very complex process – due to the subjectivity of the theme – that encompasses the areas of management, internationalization, and culture, and has intensified in recent years. This paper investigates the ways in which music festivals are currently internationalized and the internal processes prior to this decision. Its primary objective is to identify the main strategies of internationalization used by companies owning cultural goods, such as music festivals. Another goal is to fill an academic gap between internationalization theories and cultural management, contributing with the compilation and description of the main techniques employed by the market through a qualitative approach to the methodology and content analysis on decision-makers' interviews. The results can confirm the internationalization model mostly used by the sector, which prefers a phased method. Main entry strategies, territory-choosing process, and motivations and reasons behind this process are also investigated.

Keywords: internationalization strategies; music festivals; globalization; cultural industries; music industry.

JEL classification: F23; F22; F6; L82; M16; M31; Z11.

1. INTRODUCTION

Music Festivals are music events with a large attendance and a certain duration that consist of performances of several bands and artists in a limited period of time and limited space. Currently, academia has shown interest in this matter, and noted the increase of the global search for cultural products and experiences since the beginning of the 21st century, as revealed in the few studies on the topic, such as [Fillis and Lee \(2011\)](#), [Azuayi \(2016\)](#), [Tikkanen \(2008\)](#), [Ferdinand and Williams \(2013\)](#) and [Rivera Rivera et al. \(2016\)](#). Worldwide, the concerts and music events industry has showed great economic importance. From the management point of view, this field has been in full expansion since 2012. The example of music festivals' global market can be mentioned, with data gathered by Pollstar, which shows high growth in the 2012-2017 time frame by analysing the 20 biggest festivals

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worldwide, which represents an increase of US\$ 222.9 million (2012) to US\$ 338 million (2017), a rise of about 52% of this market – a little over 10% per year. Music festivals are at a moment of full supply, audience, and revenue growth, whilst globalization urges the market to heights greater than those even intended.

Even in artistic and cultural fields, such as cultural industry, whose subjectivity can hinder internationalization, this study demonstrates that this process has also happened more frequently in recent years. In this sense and bearing in mind the newly found economic relevance of the sector, there are surprisingly few published studies about music festival internationalization and its strategies– a gap in a specific field that blends management, enterprises' internationalization, and cultural products.

This study's main goal is to identify the key strategies enforced by enterprise owners of cultural goods – specifically music festivals - to internationalize their brands. This is an already difficult task due to the particularities of each market, which becomes more complicated regarding cultural products and the variables raised by this economic sector. For the market, the compilation of data about this process and how it can be carried out is also valuable, in order to help cultural and/or internationalization managers in their complicated task.

To achieve the goals mentioned above, the present work will use the qualitative exploratory methodology with data collection done through in-depth interviews with decision-makers in the music festival sector giving updated opinions and creating a broad overview to answer practical questions brought up at the moment of the cultural products internationalization, such as music festivals. The data analysis utilizes the principles of Content Analysis as indicated by [Bardin \(2009\)](#) and [Yin \(2011\)](#).

2. CONSIDERATIONS ABOUT THE MUSIC SECTOR

2.1 Historical background

Music can be defined as a cultural experience, as an element capable of creating a community ([Negus, 2015](#)), focused on aesthetic elements together with an emotional response and interpretational context ([Morris, 2014](#)). This is instrumental in creating communities and mobilizing societies ([Negus, 2015](#)). Music began to be marketed as a final product in the late 19th century, when technological innovation made possible the transformation of music into consumer goods ([Marchi, 2006](#)) for the general public.

The phonograph's emergence in 1877 ([Devine, 2015](#); [Lannes, 2009](#); [Marchi, 2006](#); [Schilling, 2017](#)) made this sector's economic development possible due to the inherent dimensions of the electronic device, which brought to the consumer facilities such as Desynchronization, Cost, Sound Fidelity, Musical Selection, Portability, and Customizability ([Schilling, 2017](#)). It is clear that the evolution of this industry was only possible with technological and consumer goods evolution, which underpin the sector's economic crises as well as its high profit moments. With the popularization and professionalization of broadcasting as a means of communication after World War I ([Marchi, 2006](#), [Tschmuck, 2006](#)), phonographic recorders lost market share until being acquired by broadcasters ([Lannes, 2009](#); [Tschmuck, 2006](#)), creating the large media corporations that exist today.

With the merger and acquisition of music companies by broadcasting companies, record companies began to have a new production-mode logic, now being responsible for

the musical production of a capitalist nature (Marchi, 2006) while being part of media corporations and/or telecommunications, which were developing electronic devices, producing radio operations, and sustaining music production to alter the entire industrial structure (Lannes, 2009; Marchi, 2006). Thus, the basis for mass culture production was created, defined by Adorno and Horkheimer, in 1947, as Cultural Industry (Marchi, 2006), or the economic sector that generates cultural products to market them to an audience.

Due to the change in their business model, music companies began to adapt their development to technological innovations of each era (Bhattacharjee *et al.*, 2009; Schilling, 2017). Technological evolution is what enables the many changes of format, support, and/or electronics undertaken by the industry, by developing their products at a lower cost with greater economic benefit (Marchi, 2006; Tschmuck, 2006). For example, the album, or LP, (Bhattacharjee *et al.*, 2009), a product with greater potential than the single recording (Marchi, 2006), reorganized the entire music production system to obtain the highest possible commercial return. It is in the 1960s, after this product's introduction, that the industry reached high economic levels and the diversification of its product range began (Lannes, 2009; Marchi, 2006; Tschmuck, 2006).

2.2 The internet and the music sector change

There is a consensus in academia about the Internet and its role in reconfiguring the music sector business model (Bhattacharjee *et al.*, 2009, Dewan and Ramaprasad, 2014; Kurtzman, 2016; Wlomert and Papies, 2016; Naveed *et al.*, 2017). The advent of the Internet and its spread altered consumer behaviour (Bhattacharjee *et al.*, 2009, Kurtzman, 2016, Papies and van Heerde, 2017). Consumers now wanted "access rather than possession" and could listen to music before deciding to buy it (Bhattacharjee *et al.*, 2009). Thus, a direct relation between the possibilities brought by the Internet and the loss in revenues of the Music Industry was noted (Naveed *et al.*, 2017, Papies and van Heerde, 2017). As a result, the sector adopted three avenues to fight the loss of revenues and face the change in consumer behaviour (Wlomert and Papies, 2016): Streaming (Borja and Dieringer, 2016; Wlomert and Papies, 2016; Aguiar, 2017), Music Unbundling (Negus, 2015; Kurtzman, 2016; Essling *et al.*, 2017, Papies and van Heerde, 2017), and the 360° Deal (Marchi, 2006; Bakker, 2011; Negus, 2015; Kjus, 2017), also known as All-Inclusive.

Streaming emerged as the music sector's great ally, broadening its consumer base and attracting those who chose digital piracy (Borja and Dieringer, 2016), being defined by academia as Innovator (Naveed *et al.*, 2017) and Revolutionary (Wlomert and Papies, 2016) and, from the management point of view, responsible for revenue increase in recent years (Ifpi, 2018). With Streaming, another important trend in the demand field is noted: Music Unbundling (Negus, 2015; Kurtzman, 2016; Essling *et al.*, 2017; Papies and van Heerde, 2017), in which the digital environment creates a type of consumer who interacts differently with music and is not attached to an album idea, as before (Essling *et al.*, 2017; Negus, 2015). The third mechanism adopted by the Music Industry companies since the 2000s is the so-called 360° deal (Marchi, 2006; Bakker, 2011; Negus, 2015; Kjus, 2017). This gives the record companies some of the revenues generated by the artist, including advertising campaigns (Bakker, 2011; Marchi, 2006), music releases (Kjus, 2017), merchandising, and other commercial ventures (Negus, 2015), as well as the largest source of revenue so far, events and performances (Marchi, 2006; Bakker, 2011; Negus, 2015; Kjus, 2017). In return,

artists receive full marketing support from their record label, resulting in a mutually beneficial agreement and mitigating the fall in revenue.

These three avenues helped not only to reset the music industry but also to increase the demand and supply for Events (Bakker, 2011; Naveed *et al.*, 2017; Papies and van Heerde, 2017). On the demand side, the popularity of events and festivals increased due to the lack of experience within the digital music consumption (Naveed *et al.*, 2017). On the other hand, the supply of events and festivals increased since artists started to get most of their income from this channel (Naveed *et al.*, 2017; Papies and van Heerde, 2017), and due to the industry's new configurations, record labels started to rely on this resource (Bakker, 2011), encouraging it more and more.

3. CONCERTS AND MUSIC FESTIVALS

Marshall (2013) and Naveed *et al.* (2017) argue that with the music sector evolution throughout the years, the power centre and value creation was transferred from record labels to the concert's sector. From the management point of view, this can already be seen in some markets around the world, such as the UK (Anderton, 2011; Cho *et al.*, 2017) and Spain (Montoro-Pons and Cuadrado-Garcia, 2016), where the musical events sector is more economically important than the traditional music industry.

Music Festivals differ from concerts by bringing a selection of brands and artists, called "lineup" (Hiller, 2016), which changes from year to year, bringing dynamism to the festivals' positioning (Kuijken *et al.*, 2016). Within this lineup, there is usually a hierarchy in which bands and artists with higher demand, the so-called headliners, have greater financial compensation and higher profile in promotional material, due to their artistic, cultural, and/or economic weight (Hiller, 2016). Moreover, with the growth of this industry, music festivals are no longer limited temporally or spatially, given the fact "that festivals offer activities outside of their season dates" (Negrier *et al.*, 2013, p. 35) and are decentralizing their offer to the public.

Festivals are usually held in large areas close to urban centres, promoting an idea of freedom (Szmigin *et al.*, 2017), alternative society (Anderton, 2011), and counter-culture (Morey *et al.*, 2014) features weakened since the 2000s in face of the growing commercial message. For academia, festival's economic growth is due to their market evolution and to the professionalization and corporatization of the industry (Anderton, 2011; Morey *et al.*, 2014), which was created in order to attract and maximize consumption among their target audiences (Szmigin *et al.*, 2017).

One important contribution of music festivals to their local economy is their big tourism potential, attracting public from different areas to their influence zone (Andersson and Getz, 2009; Cashman, 2017; Szmigin *et al.*, 2017). They attract this public using local features and products in order to add value to their services (Diaz Soria *et al.*, 2014), in their communication or directly in the event.

3.1 Typologies

Kuijken *et al.* (2016) mentions that the most accepted form of categorizing musical products is the musical genre. In a music festival musical genre is an important factor of differentiation – both vertical, referring to a hierarchy between artists and genres, and

horizontally, referring to different artists of each genre (Hiller, 2016) – and this is what most influences the consumers' buying decision (Kuijken *et al.*, 2016). Expanding this classification, other aspects driving the marketing and communication of a music festival are its target or lifestyle (Morey *et al.*, 2014) and its size (Anderton, 2008; Kerr and May, 2011; Morey *et al.*, 2014).

Table no. 1 illustrates the main typologies and forms of differentiation of music festivals.

TABLE no. 1 – Typologies of a music festival

Musical Genre	Festival's Location	Target/Lifestyle	Size
Pop	Country	Generalist	<i>Boutique</i> (audience smaller than 10 thousand)
Rock	Urban Area	Eco-sustainable	
Folk	Resort	Familial	<i>Mid-Scale</i> (audience between 10 thousand and 50 thousand)
Metal	Amusement Park	Indie/Alternative	
Dance/Electronic	(...)	Hippie	<i>Large-Scale</i> (public between 50 thousand and 100 thousand)
Jazz		(...)	
World Music			<i>Mega-events</i> (audience larger than 100 thousand)
Classic			
(...)			

Source: own elaboration, with information taken from Anderton (2008); Anderton (2011); Morey *et al.* (2014); Kerr and May (2011).

3.2 Relationships between the sector's reorganization and the consumer

The new consumer finds in the music festival an extremely favourable environment for their needs, as festivals have evolved to present attendees with a completely commercial and experience-oriented environment (Anderton, 2011; Morey *et al.*, 2014). Previous research has identified four facets of music festivals' experience, the participants' motivations and its relationship with the public (Ballantyne *et al.*, 2014). Other aspects studied by academia, transversal to all sectors of the music industry, which have also popularized music festivals since the beginning of the 21st century (Anderton, 2011) are:

- Digital music consumption: many researchers have been studying the relationship between the change in consumer behaviour and the increasing demand for concerts. The positive correlations between digital piracy and the expansion of the music events sector were found by Mortimer *et al.* (2012) and Krueger (2005). Cho *et al.* (2017) and Mortimer *et al.* (2012) who also reached the conclusion that artists have started to hold more concerts since the 2000s, whether related to demand (Hiller, 2016) or supply. Streaming is also one of the concert industry drivers studied by Naveed *et al.* (2017) and Nguyen *et al.* (2014). It is a more positive option for the Music Industry development, as it is not related to the reduction of revenues (as is piracy, and even helps to fight it) (Nguyen *et al.*, 2014). Unbundling is also considered positive for the concert sector (Papies and van Heerde, 2017) through the promotion of artists (Hiller, 2016).

- Social networks and the media: the role of music sector companies and corporations in the increase of music festivals' commercial nature is related to the growing media coverage of its spaces (Anderton, 2011; Morey *et al.*, 2014), with media partners in all and more strategic communication types to strategically promote the event to the greatest number of people possible. Social networks also take part in this process (Morey *et al.*, 2014; Leenders *et*

al., 2015; Naveed *et al.*, 2017) either by improving the consumer-artist relationship (Leenders *et al.*, 2015; Naveed *et al.*, 2017), or by offering strategic advantages to organizing companies (Montoro-Pons and Cuadrado-Garcia, 2016; Naveed *et al.*, 2017), such as information about target and targeted promotions, or by expanding the process of social inclusion and creating the public persona that these events enable (Morey *et al.*, 2014).

4. INTERNATIONALIZATION STRATEGIES

With the exceptional growth of the global experience market, supported by the consumer's changing behaviour due to technological evolution, globalization enables synergies between industries to emerge, leading to greater professionalization and consolidation of firms in the field of experience economics (Christensen, 2009). The strengthening of this phenomenon drives greater demand of companies and corporations for the internationalization (Fillis and Lee, 2011) of their products and/or services.

The study of internationalization processes began in the mid-1970s, when Swedish researchers Johansson and Vahlne and their colleagues created the Uppsala Model (Hilal and Hemais, 2003). The Uppsala Model describes the internationalization process as linear and evolutionary, with companies exploring the international market gradually and with caution (Hilal and Hemais, 2003), thus acquiring strategic information at each stage of their international presence, decreasing its uncertainty and potential for failure (Hilal and Hemais, 2003; Oliveira, 2014). Despite its pioneering nature, Uppsala Model Theory is criticized due to its internationalization process linearization, which does not always occur in an evolutionary way, and its lack of comprehensiveness before the new configurations of global companies (Oliveira, 2014; Santos, 2017). Another important theory in the internationalization field is the Network Theory (Araujo, 2013; Sá, 2016; Santos, 2017), which considers the company's involvement in a complex and dynamic network composed of customers, competitors, suppliers, and other stakeholders, generating - or not - synergies (Sá, 2016; Santos, 2017). More recently, the Born Global Theory has studied the phenomenon of companies, especially in the technology sector (Santos, 2017), which begin the process of internationalization at the time of the company's emergence or close to it (Sá, 2016; Santos, 2017).

Despite a significant rise in global demand for cultural goods and products and the fact that internationalization and entrepreneurship are two of the most influential features of creative industries (Fillis and Lee, 2011), few are the studies on the internationalization process of services based on experiences, as is the case of the Music Festival. Fillis and Lee (2011) studied the internationalization of Korean performing arts at UK festivals and concluded that in this uncharted area, combining business marketing strategies with creative marketing concepts is the key for entry, survival, and growth in new markets, after all "these forms are significantly different from the conventional notions of internationalization (...) and creative thinking helps the understanding of the arts internationalization by influencing the division between the artistic and the market orientation in the development of audiences" (Fillis and Lee, 2011, p. 823). Tikkanen (2008) has investigated the inward internationalization of Kuhmo Chamber Music Festival, a music festival in Finland that initiated this process. This topic – the inward internationalization – was also researched by other authors such as Ferdinand and Williams (2013) and Rivera *et al.* (2016), who studied

this strategy: the transformation of local events into international ones to attract tourists, recognition and economic benefits.

Ferdinand and Williams (2013) adapt the internationalization strategies described by Hill (1999) for cultural events and products, leaving five possible strategies for this sector, as summarized in Table no. 2.

TABLE no. 2 – Possible internationalization strategies for cultural products

Strategy	Definition
Export	When production is held in the country of origin and marketing or sales in foreign markets. This is considered an inward internationalization strategy, in which production and event delivery will be local, but there is an international effort in its advertisement, mainly in attracting tourists to the venue.
Licensing	The copyright holder grants his intellectual property to a partner in the target market in exchange for royalties.
Joint-Venture	Company product of the merger of two or more to perform specific tasks in a foreign market.
Foreign Direct Investment	Entry into the foreign market with capital of the company that seeks internationalization, for the creation of its own products.
Franchising	Permission for the use of a company's intellectual property by another through the payment of a fixed fee.

Source: adapted from Ferdinand and Williams (2013)

In addition to the general difficulties that companies have in the internationalization of products, such as increased competition, problems in target identification and others, companies in the cultural commodities sector provide aesthetic experiences (Fillis and Lee, 2011) to their consumers, a feature susceptible to interpretation and probably problematic at the time of its internationalization. Furthermore, companies in this field should be aware of the need to create new products or adapt those intended to be internationalized, in an attempt to satisfy consumers that have different cultural tastes (Fillis and Lee, 2011). It is thus important for companies to keep their motivations in mind before starting this process.

4.1 Territory Selection and Reasons for the Internationalization Process

The process of internationalization is based on strategic knowledge acquisition related to the various business aspects, a step considered fundamental to the project's success (Casillas *et al.*, 2009; Berbel Pineda *et al.*, 2012). The buildup of a greater amount of information about the target market is a decisive factor in the initiative's success or failure, since it allows the company to make the best decision with the lowest risk possible (Berbel Pineda *et al.*, 2012; Sá, 2016).

The internationalization process' main choice is the decision of which market to enter (Berbel Pineda *et al.*, 2012). This is best done in three stages: preliminary review (i), identifying potential markets through macroeconomic indicators and eliminating those that are not appropriate; identification in depth; (ii), the assessment of the market sector size and the costs of entry; and the final selection (iii), with the selection of the country with the best chance of success according to the company's previous goals and motivations (Berbel Pineda *et al.*, 2012). The preliminary valuation is done in the first phase (Berbel Pineda *et al.*, 2012), consisting of a classification of potential markets based on selection criteria.

The way information and knowledge become action and selection of the target market was studied by [Casillas *et al.* \(2009\)](#) and involves the use of prior knowledge to recognize an international opportunity, leading to the search for new information that is assimilated and corrected to undertake possible actions, such as market selection and mode of entry. This project's execution generates more knowledge, giving strategic information to the company, that can be adapted to new territories and internal processes. This process also determines the speed of entry into a new market ([Casillas *et al.*, 2009](#)). Among the reasons for the internationalization process, the main ones are the finding of a potential for consumption in the foreign market - when the domestic market is very competitive, for example - risk diversification - dividing operations amongst several markets can reduce the impact of problems in one of them - and the increase in profitability and knowledge ([Azuayi, 2016](#)). The choice of country must agree with these motivations: the level of growth, the level of market maturity, whether there are incentives or barriers for entry, and other aspects must be assessed by the company willing to internationalize ([Azuayi, 2016](#)).

Due to the existence of several reasons and entry modes, each economic sector finds the one most appropriate for its objectives ([Azuayi, 2016](#)). This study's theoretical framework defines reasons and motives for internationalization according to [Fillis and Lee \(2011\)](#), who studied this process for companies in the cultural production field. A rise in the company's profile and international positioning are some of these reasons that will eventually facilitate other internal company processes, such as hiring performers and acquiring talents ([Fillis and Lee, 2011](#)).

5. METHODOLOGY

This work's main goal is to identify the key strategies used by companies that own cultural goods, such as music festivals, to internationalize their brands. In the academic and management contexts, research seeks to fill the gap between internationalization theories and cultural and artistic assets management aiming to help international management activities of cultural enterprises with the collection and evaluation of internationalization strategies that may or may not be used for the market and management.

To do so, an exploratory qualitative research methodology was used. This type of methodology is considered the most enlightening in information gathering for the studies whose questions are centred on "why" and "how" some phenomena occur ([Wilson, 2016](#)), as applied in the study of subjective and explanatory questions.

In this study a qualitative approach is selected because it is widely used in social and interpretative studies due to its characteristics, which allow a more subjective study of the problems presented ([Wilson, 2016](#)). The exploratory research aims to find the estimated overall view of a particular fact, involving literature review, document collection, and/or discussion with experts ([Gil, 2008](#)). Usually, quantitative techniques are not used in these surveys, and are applied when the subject is recent and little explored, requiring firstly a delimitation and information clarification ([Gil, 2008](#)).

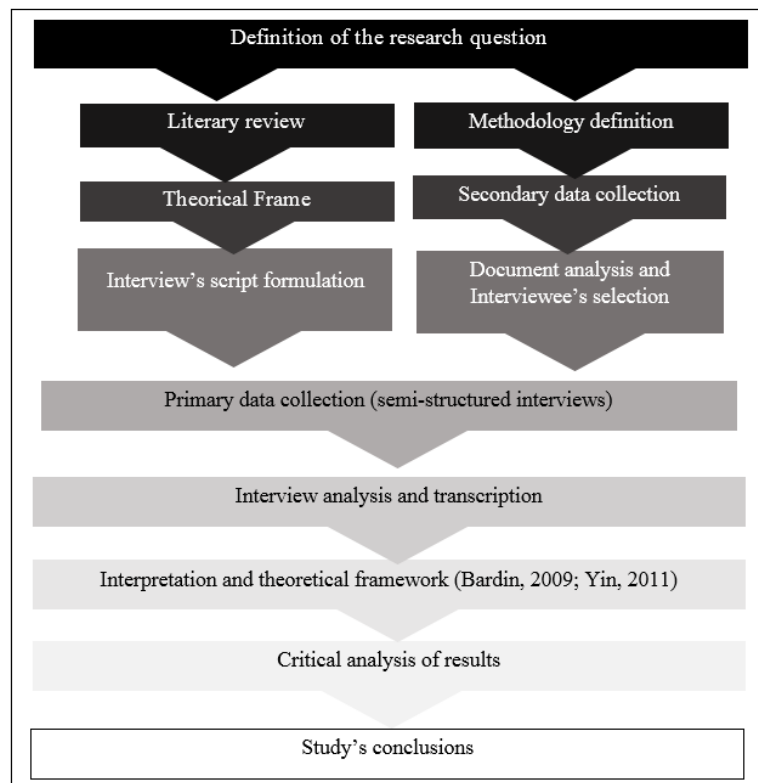
This is the most appropriate methodology for this study, considering that the topic is underexplored by academia and extremely subjective and plural, taking into account the company and managers of cultural marketing visions. Exploratory methodology narrows this information, contributing to future studies and to the corporate field one of this work's goals.

After presenting these definitions, primary data were collected. In this study primary data are retrieved from interviews with the sector's decision makers, conducted with brand managers related to the theme, with a previously developed script.

The interview is a technique in which the “investigator presents himself to the one being investigated and asks him questions, in order to obtain the data that interests the investigation” (Gil, 2008, p. 117). According to Gil (2008), this data collection technique is the one most used in social sciences research due to the features that allow data collection about what “people know, believe, expect, feel or desire, intend to do, do or did, as well as their explanations or reasons regarding previous matters” (Selltitz et al., 1967 apud Gil, 2008). Among the types of interview applied by social researchers, the one chosen for this study is the semi-structured individual interview. This technique, one of the main ways of collecting information in the qualitative methodology, allows the researcher, through a set of open questions, to collect the interviewee's opinions, points of view, and motivations through a script previously defined on matters of interest for the research (David, 2017).

Figure no. 1 shows the stages of data processing and data collection in this study.

Figure no. 1 – Data Processing and Data Collection



Source: own elaboration

5.1 Investigation premises

After reviewing the literature and defining the conceptual model, it is also necessary to elaborate the research premises that will guide the collection and analysis of the empirical data of this study. The premises are related to each category of the conceptual model's internal, external context, and actions - and are organized in the following order:

Premise 1: The changes in consumer behavior and in the music industry reorganization are related to the increase of the music festivals market.

Premise 2: Certain types of music festivals make it easier to differentiate and internationalize music festivals.

Premise 3: The internationalization mode of music festivals follows the Uppsala model, with Network Theory and Born Global being less important to the sector.

5.2 Analysis of collected data

To obtain a thorough analysis of the collected content, the theoretical framework of the data is done according to Yin (2011) and Bardin (2009), two reference-authors in qualitative methodology who defined the most accepted parameters in content analysis. Content analysis is defined as “a set of methodological tools (...) that analyses different sources of content (verbal or non-verbal)” (Silva and Fossá, 2015 p. 3), allowing the researcher to divide this content into categories, facilitating their comprehension and subsequent classification.

To have more concrete and credible results the NVIVO Pro 11 software was used in collected data interpretation and exploitation, a categorization tool widely used in qualitative research. NVIVO helps the researcher “to define and explore research ideas, to find relevant text for complex ideas, to pursue strong intuitions in all directions, to maintain those that are useful, to formulate and test hypotheses” (Richards and Richards, 1991, p. 308 *apud* Sá, 2016).

5.3 Study Objects

This work's study objects are music festivals with international editions around the world, so that the internationalization process can be understood as well as which strategies are used by the companies that own these brands. International Festivals can be defined as those that take place outside their country of origin.

The study objects (festivals) include the Festival 250 - 2017” (Festival 250 Festival Insights & CGA Strategy, 2017) and “Festival 250 – 2016” (Festival 250 Festival Insights & CGA Strategy, 2016) report, which list the 250 largest festivals in the world. The exception is the MIMO festival, added to the list after confirming its manager's interview in this study. The presence of the MIMO Festival in this list helps to enrich the research, elucidating the strategies and motivations of smaller sized festivals for internationalization, diversifying the results obtained.

5.4 Sample

It is important to note that the interviewees were selected through aspects that determine their proximity to the theme and objects of study, so that the results obtained are better adapted to the research performed, considering that the goal of this work is not to test

a hypothesis but to contribute to the creation of a theory in the field (K. M. Eisenhardt and Graebner, 2007). Therefore, those selected for this study belong to large companies and institutions in the music festivals field. K. Eisenhardt (1989) also helps to define the sample size - in this case, the number of interviews. Theoretical saturation is the ideal point where the addition of data no longer adds relevant information in the analysis (Glaser & Strauss, 1969 apud K. Eisenhardt, 1989). For this reason, an acceptable number of participants in a work of this type is between 4 and 10: at least 4, so that the information collected is complex enough for a meaningful analysis and at most 10, so that the data analysis does not become repetitive and too bulky (K. Eisenhardt, 1989). With this, 6 people were sought to participate in this investigation, and 5 people responded positively to the invitation and accepted to participate. Tables no. 3 and 4 compile the proximity factors, the information related to these selected respondents and the objects of study.

TABLE no. 3 - Reasons for selection of interviewees in this study

Participants	Position	Selection Factor	Information related to the selection
Participant 1	President of the Portuguese Association of Music Festivals (APORFEST)	Represents Portugal's music festivals sector nationally and internationally.	APORFEST is also the Portuguese ambassador of Sziget, a Hungarian music festival.
Participant 2	General-Director of MIMO Festival	Manages and produces MIMO Festival, with multiple editions in Brazil and Portugal.	MIMO Festival is a mid-scale (Anderton, 2008) World Music, Jazz and Instrumental music festival, in activity since 2004, originally from Brazil.
Participant 3	Director of Operations NETPdv	Was the director of operations of Ultra Music Festival Mexico and Tomorrowland Brazil, besides performing a similar task in the Olympic and Paralympics of Rio de Janeiro (2016)	Ultra Music Festival is a mega-event (Morey et al., 2014) Electronic music festival, in activity since 1999, originally from USA. Tomorrowland is a large-scale (Anderton, 2008) Electronic music festival, in activity since 2005, originally from Belgium.
Participant 4	General-Director Ritmos	Manages and produces the Portuguese version of Primavera Sound and Vodafone Paredes de Coura.	Primavera Sound is a large-scale (Anderton, 2008) Alternative music festival, in activity since 2001, originally from Spain.
Participant 5	Global Marketing Director Rock in Rio	Responsible for the Marketing area of Rock in Rio, the largest festival in Brazil and with editions in Portugal, Spain, and the USA.	Rock in rio is a mega-event (Morey et al., 2014) general music festival, in activity since 1985, originally from Brazil.

Source: own elaboration

Table no. 4 – International Editions of participant's music festivals

Participants	Music Festival	Original Country	International Editions
Participant 1	N/A	N/A	N/A
Participant 2	MIMO Festival	Brazil	<u>Portugal</u> (2016/2017/2018/2019)
Participant 3	Ultra Music Festival	USA	<u>Spain</u> (annually from 2007-2019) <u>Argentina</u> (annually from 2012-2017) <u>South Korea</u> (annually from 2012-2018) <u>South Africa</u> (annually from 2014-2018) <u>Croatia</u> (annually from 2013-2018) <u>Chile</u> (annually from 2013-2016) <u>Japan</u> (2014/2015/2016/2017) <u>Thailand</u> (2014/2015/2016/2017) <u>Brazil</u> (2008/2016/2017) <u>Indonesia</u> (2015/2016) <u>Singapore</u> (2016/2017) <u>China</u> (2017) <u>Mexico</u> (2017)
	Tomorrowland	Belgium	<u>USA</u> (2013/2014/2015) <u>Brazil</u> (2015/2016) <u>France</u> (2019/2020)
Participant 4	Primavera Sound	Spain	<u>Portugal</u> (annually from 2012-2019) <u>USA</u> (2020)
Participant 5	Rock in Rio	Brazil	<u>Portugal</u> (2004/2006/2008/2010/2012/ 2014/2016/2018) <u>Spain</u> (2008/2010/2012) <u>USA</u> (2015)

Source: own elaboration

6. RESULTS

The analysis of the interview data is based on the theoretical premise described in the previous section, considering the theories of [Bardin \(2009\)](#) and [Yin \(2011\)](#). With this, the information is processed in the following order: content encoding, analysis of the results and the discussion.

6.1 Content encoding

The responses of the interviewees were coded using the usual methods of Content Analysis. After the interview's full transcription, a database was created in NVIVO Pro 11 with the information collected ([Bardin, 2009](#)) for the definition of categories of analysis, or clusters, which are: Interviewee's contextualization (1), External Environment (2), Internal Environment (3) and Internationalization strategies (4).

With the first category, information regarding the respondent and her/his relevance for the study is obtained. The second category makes it possible to identify the external factors that influence the concert and festivals sector, and which may or may not influence internationalization. This category is subdivided into three, whose content is important to differentiate: consumer and sector changes (1), globalization (2), and Portugal (3). In the

third category, the aim is to gather information about the internal context of the company that produces and promotes these festivals. The analysis is also subdivided into categories: typologies and internationalization (1), partnerships (2), differentiation (3), and challenges (4). Finally, the last category aims to discover the ways this process is conducted and is also subdivided: motivations and benefits (1), choice of country (2), entry strategies and models (3), future (4), and own experience (5) of each interviewee, building a rich outlook between theory and practice in this sector.

6.2 Results Analysis

The results presented in this section were possible due to previous stages of encoding, quantification, and reading of all interviews, in order to achieve the research goals.

All interviews began with a brief contextualization of the interviewee, to reinforce their relevance to the study. Most respondents have one or more internationalization of music festivals experience in their professional history.

6.2.1 External Environment

The five interviewees agree that the music industry is in a different configuration than it was in previous years. When asked about the factors that led to this, we obtained a set of answers and halts in the topics asked. Concerning the 360° Deal, all disagreed with the theoretical assertion that they were responsible for the concert's expansion. The positive relationship between digital consumption and the increase in concerts and festivals' relevance was argued by four of the respondents (Participants 1, 2, 4, and 5), who in consensus say they are something that enables, spreads, and encourages the public and the artist to look for ways to meet face-to-face. Four of the interviewees believe that the consumer, losing the connection with the experience factor that music contained - buying the physical album and listening to it on specific machines - became more interested in the experience of concerts and musical events.

Bearing in mind the study's theme, globalization was also a matter to be discussed by the interviewees. On the consumer's part, all respondents were resounding in replying that the greatest positive point of the phenomenon is the free circulation of information around the world, generating a "migration of styles of music around the world" (Participant 3), "easing the exchange" (Participant 2), allowing "not to exist a series of filters that existed before" (Participant 4). To music sector companies, it is possible to have "access to trends and to what many different markets are doing" and "gain knowledge and notoriety around the world more easily" (Participant 5), it also facilitated "transportation, bands mobility, the synergy between the countries" (Participant 1). However, drawbacks of this process were also raised by Participants 2, 3 and 5: while the first two reflect on the need of individual cultures and diversity's protection, the last mentions that a great economic power is needed to really reach audiences around the world. Participant 2 also discusses the birth of the label World Music and its implications within the process of music globalization.

6.2.2 Internal Environment

Concerning the internal environment of music festivals companies, the interviewees were asked about the festival's typologies and their relationships with internationalization. Some agree that festivals of certain music styles are easier to be internationalized such as Electronic (Participants 1 and 3), Hip Hop, and Rock (Participant 1). The number of editions made or years in activity and a strong and well-defined brand are also aspects that enable internationalization (Participants 2, 4, and 5). Regarding the festivals' size and ease to internationalize, two respondents said it could be an advantage or a disadvantage (Participants 1 and 5), in the sense that this allows greater bargaining power, but it could be more expensive for the process to reach another territory.

In this sense, a few steps are taken for a music festival's successful execution, both internally and externally. Brand differentiation before competitors is one of them. About the topic, respondents gave many examples of how the differentiation is created by the companies that produce music festivals. The greatest consensus on the subject stems from the need for brand coherence and care with product delivery (Participants 2, 3, and 4) and the non-negotiation of factors inherent to the brand and the identity of the festival, which should not be changed in order to maintain continuity and regularity in the audience's mind (Participants 2, 4, and 5).

Two respondents also mentioned marketing as a differentiation target (Participants 2 and 4); the analysis of its target audience and its direct competitors were also cited for assisting the cultural manager in the creation of this process (Participants 1 and 2). Participant 1 divides the current forms of differentiation between the smaller and the indie festivals - these, needing a strong concept to offset their reduced budget - and the big and mainstream - with the creation of a comprehensive lineup. This was disagreed by Participant 2, citing that big festivals open their ticket sales before having a lineup ready and sell out even before announcing all artists. Concerning large festivals, the interviewees mention that their greatest source is in the creation of days targeted to profiles of different audiences, such as Rock in Rio. About this festival, Participant 5 mentions that it involves a transversality of genres and artists, in order to accommodate all the music-loving audience of the market they are in. At the moment, besides music, the festival is increasingly hosting different content to complement its entertainment supply, such as gaming, the digital world, and food/dining. The festival's difference is to have a "legitimate offer for parents and children to spend a day with the family" (Participant 5). Participant 3 also describes how Tomorrowland invested in dining with the presence of a Michelin star-rated restaurant, something approved by the public, and how that strategy has grown in recent years. Participant 4, who manages two distinct brands of music festivals - NOS Primavera Sound and Vodafone Paredes de Coura - believes that the establishment and execution of different proposals- and with a high standard of musical quality in both - is what enables the success of their projects. According to the interviewee, his festivals are different: "one is urban, another is rural, one is hotel/airbnb festival, and the other is camping (...) the age itself is completely different (...), they are very different audiences in terms of age groups" (Participant 4).

Another step in this direction is the search for sponsorships and partnerships, public and private. The consensus among all the interviewees is that partnerships in this sense are very welcomed, especially for making festival prices more competitive for the public

(quoted by Participants 1 and 4), but a festival can be done without them, taking into its business model, BOOM Festival is an example of this (Participant 1). Public partners support festivals in a certain way, considered insufficient or almost non-existent (Participant 3) or residual (Participant 4). Public support, for Participant 2, in MIMO Brazil is what makes possible the festival's existence - which has no ticket office - due to the Rouanet Law allowing private sponsorship of cultural events to be taken as a tax deduction, a dynamic of the Brazilian domestic market. However, regarding internationalization, this same public support is non-existent. Regarding this question, three interviewees believe that it is possible to internationalize only with partnerships and private sponsorship (Participants 3 and 4) or that the support's absence makes the process difficult (Participant 1); two other respondents think it may be possible according to the festival structure and its business plan (Participants 2 and 5). These opinions are supported by the professional experiences of each one: Rock in Rio searches for partnerships at the beginning of each edition's planning, always following the same logic and order to obtain government support initially, then an agreement with media, and lastly, the sponsors (Participant 5); MIMO Portugal has in its list of sponsors the Millennium BCP Foundation, the Santa Casa da Misericórdia in Lisbon, Azul Linhas Aéreas, and is presented by the Amarante City Hall, in addition to the "CCDR-N and European funds, which sometimes are not possible" (Participant 2); and finally concerning the Primavera Sound event dimension in Portugal, Participant 4 says that if he had not had sponsorship with naming rights from Optimus - now NOS - he would have made the festival tickets three times more expensive.

6.2.3 Internationalization Strategies

Considering the study's theme, it also focused on internationalization strategies, starting with this process' trigger: the motivations and benefits of reaching new territories. Greater brand awareness and strengthening were the reasons described by three of the respondents (Participants 1, 2, and 5). Brand strengthening is both a motivation for the search for other markets and a benefit for MIMO editions in Brazil, according to Participant 2, who notes a greater power of communication within the country of origin after its internationalization to Portugal. Also mentioned as motivation was the awareness of a business opportunity in another country (Participants 2 and 5). As an example, the internationalization process of Tomorrowland was described by Participant 3 as a business-based decision - in view of the success of the national edition in Belgium - not supported by the brand's founders but carried out by the directors of the companies that own the festival. The process was unsuccessful in the United States, due to issues of trademark - the name Tomorrowland was registered by Disney and the festival had to be called TomorrowWorld - and high expectations with the festival coming to the country, that in the end were not fulfilled. In Brazil, the process was also unsuccessful, with the second edition resulting in a financial loss. Currently, Tomorrowland is not present in any other country, but a winter edition will be held at the French Alps in 2019. Another example given by Participant 5 is Rock in Rio, whose company had no interest in the internationalization process until receiving the invitation of government entities of Portugal to carry out an edition in that country. Then a business opportunity was perceived that eventually materialized, and since then, the festival has already grown with editions in Spain and the United States and received the invitation of Argentina, which will be studied carefully.

Regarding the country choice, three of the respondents state that it is done through economic factors such as: where there is a business opportunity (Participant 3); and after conducting a market study (Participants 4 and 5), which, within the organization of Rock in Rio is done by a specific area of Internationalization, with a duration of up to one year, being financed by the company itself. Participant 2 completes this question by answering that the choice of MIMO for Portugal is owed to cultural and social factors, such as the proximity of the Brazilian and Portuguese language and cultures, motives that are also very present in the festival's identity, emerging from a desire of the organization and followed by a business plan.

Concerning entry strategies and internationalization models, the greatest consensus among respondents, with four of the respondents agreeing, is that the internationalization process is best done in a phased manner. Participant 3 replied that he believes that it is done through a business network worldwide, citing the examples of the Ultra Music Festival and Tomorrowland, two electronic music festivals that also entered new markets through a franchising strategy. This strategy is executed with the "franchisor responsible for assembling two things: (...) for the quality of the event in terms of lineup setup and (...) by the delivery standards" (Participant 3). About franchising, Participant 4 believes it is not a good way to internationalize a festival, due to the high possibility of the franchisor losing control and consistency of his product. In the case of Rock in Rio, an investment of its own capital is made in the new territory and local partners are sought to perform the necessary tasks, something indispensable to understand the local culture and reduce the potential for error (Participant 5). Two of the respondents are festival directors internationalized through the creation of a society and believe it to be the right way to do it (Participants 2 and 4). By contrast, Participant 1, when discussing the gain of international tourists, the most common entry strategies are international communication and the creation of sales focused on the target territories.

Considering the industry's background and current condition, study participants were also asked about the internationalization process' future in the music festivals sector. Three of the respondents answered that there will be a slowdown in the sector so that players become more competitive and the events' quality higher (Participants 1 and 4), and Participant 3 predicts that this process will only be carried out by large companies. Participants 2 and 5 believe that the internationalization process will continue to intensify, either by entering new territories - specifically concerning their events, the first would like to do two more European editions; and the latter mentioned some locations that would have a possible Rock in Rio presence in the future, such as Argentina and Poland - as well as the global spread of the brand in social media. Still regarding this theme, when asked about Vodafone Paredes de Coura festival internationalization, Participant 4 says that it is not possible due to its features being inherent to the place of origin.

6.3 Discussion

The main goal of this work is to understand strategies put into practice by companies that own cultural goods - specifically, music festivals - in the internationalization of their brands and products. To obtain an effective answer, a literature review and document research was carried out to obtain secondary data, which made it possible to conduct interviews with relevant people of the sector - directors and managers of internationalized

festivals and a president of a Portuguese associative entity - so that this process unfolding, and goals of this research could be accomplished.

Empirical data obtained from the interviews confirmed most of the premises presented in the literature review. The interviewee's diversity, who are music festival managers with different suggestions and in different styles and stages of internationalization, allowed a more comprehensive insight of the area and of this process, which enhances the study.

From the start, the study revealed that these respondents - all leading names in the industry - understand the changes that the Internet brought to the music industry, both in terms of changes in the internal configurations of music companies and also the change in consumer behaviour, which is aligned with the propositions of [Bhattacharjee et al. \(2009\)](#), [Kurtzman \(2016\)](#) and [Papies and van Heerde \(2017\)](#) on the internet's advent and the drastic reconfiguration of the industry. Given that these managers and their organizations have been in this field for a considerable time and personally witnessed these changes, this alignment was expected. This validation supports this study, since these changes lead to a supply and demand increase for concerts and festivals, producing a favourable external environment for their internationalization.

However, the theoretical assumption that the industry's 360° deals with the artists were the main factors for the peak in the concerts sector ([Bakker, 2011](#); [Kjus, 2017](#); [Marchi, 2006](#); [Negus, 2015](#)) was denied by all respondents. It was the only theoretical proposition completely refuted by all respondents, who more properly believe in the positive correlation between the digital music consumption and the sector's growth, similar to the results of [Naveed et al. \(2017\)](#) and [Nguyen et al. \(2014\)](#). This leads to the conclusion that the use of music as a promotional element for the disclosure of an artist's concert, which would be where it has its greatest potential for economic gain - and where the audience has the greatest experience factor - is the main strength and power that entertainers in this area have (to the detriment of record labels and other organizations of the so-called traditional industry), confirming what is stated in [Marshall \(2013\)](#) and [Naveed et al. \(2017\)](#). The interviews also reveal these managers' strong need to create and/or continuously reinforce experiences for their public. This movement by festivals and music concerts drives the absence of this same element in digital consumption, as described by [Naveed et al. \(2017\)](#). These reasons add to what [Anderton \(2011\)](#) and [Morey et al. \(2014\)](#) concluded by exposing the corporative and commercial features of the existing music festivals as responsible for the professionalization and evolution of the sector, something that is also supported by the interviewees. To this professionalization an increasing media quality in music festivals can also be added, be it in the search of media partners or in the sale of their venues, stated by [Anderton \(2011\)](#) and several of the respondents.

The study's respondents universally revealed the need to differentiate themselves in the market, as described by [Morey et al. \(2014\)](#). This is an expected statement, given the sector's growth, which is highly competitive. Today this differentiation is made in the brand identity, concept plans, marketing, communication work, event production, target audience observation (as described by Kotler) lineup management, and more precisely, the predominant musical genre of the festival, another theoretical statement ([Hiller, 2016](#)) confirmed by the study.

The research also questions whether these types of music festival differentiation can help or hinder their international intentions, a question that evoked a mixed response from the participants. Some musical genres (especially the more globalized ones, such as

electronic), internal factors and brand history are enablers of the internationalization process, but they do not determine their success.

Regarding the internationalization models, the study almost unanimously confirms the sector's preference for the Uppsala model. The Swedish researchers' model, suggesting that international growth is better developed through phases and in a gradual way, is considered ideal by managers in the internationalization process, due to its lower potential for failure in a sector whose management difficulty is notorious. The Born Global Theory cannot be considered relevant for this economic sector since it would involve a very large investment with few chances of financial return. Only one interviewee suggested Network Theory, with its internationalization done within a network of synergies among stakeholders. This is the only participant in the study to have professional experience with the strategy of entering another franchising territory - through the electronic music festivals Ultra Music Festival, Tomorrowland and Sensation - which can be a direct correlation, considering this business administration model's features. The leading reference for the internationalization of cultural goods was written by [Ferdinand and Williams \(2013\)](#), when studying the pull of international tourists to the Carnival of Trinidad and Tobago, adapting the strategies of entrance of [Hill \(1999\)](#) for the culture sector. Defining five possible ways to conquer a new territory - Export, Licensing, Joint Venture, Direct Investment, and Franchising - the researchers have their theory confirmed in part with this study, with respondents citing at least one of these in their line of work, apart from licensing.

More specifically, Export, regarding the festival's image, was the entry mode reported by Participant 1 in the situation of attracting international tourists, such as BOOM! Festival; Joint Venture, or a company's creation in a foreign market, was used by two respondents in the internationalization of their festivals - Participant 2, MIMO Festival and Participant 4, NOS Primavera Sound; Direct Investment, with its own capital in the new territory, is the entry strategy chosen by Rock in Rio in all markets in which it does business, according to Participant 5; and Franchising, already mentioned as part of the professional experience of Participant 3, to be used by the electronic music festivals Ultra Music Festival, Tomorrowland and Sensation.

The study also sought to understand how companies in the sector choose the territory they intend to settle. The theoretical proposition of [Berbel Pineda et al. \(2012\)](#) was considered, with the acquisition of economic and strategic information from the target territories and then, in a phased manner, to choose the best opportunity and start the process of obtaining partnerships. The process of constant learning, feedback, and adequacy of the strategy described by [Casillas et al. \(2009\)](#) as a determinant of the speed of entry into the new market, is also present in this sector. One of the study's respondents, Participant 2, was the only one to state initially choosing the territory for MIMO Festival internationalization because of the cultural proximity of its brand with Portugal, which does not undermine the theoretical importance of the proposition given that the interviewee confirmed her choice after obtaining strategic information about the country, legitimizing it, undertaken initially in a social/cultural way, with economic aspects that supported the existence of a real business opportunity.

7. CONCLUSIONS

Assuming that the Globalization phenomenon studied in this paper and in many others will continue to intensify in the future, with more and more connections between global markets and their different economic areas, it is certain that music festivals internationalization will continue to occur.

Regarding the issues raised by the research, the main strategies used in the sector for the music festivals internationalization were defined through literature review and interviews with significant people of the sector, supported by the designated methodology. Not only has this goal been achieved, but the study also brings together the areas of internationalization theory and management of cultural and artistic assets, benefiting both academia and the market. A compilation of steps, processes, and data is performed for all the process of internationalization, creating a valuable manual to support, the role of the cultural manager and the international cultural marketing professional, based on theory and practice.

The study shows that the music industry's internal reorganizations occur constantly over the years because of its initial configuration as capitalist and its inherent relationship with the technology industry and its innovations. However, the Internet's emergence has brought a deep restructuring of the music business model, due to its subsequent change in consumer behaviour, which generated an urgent system alteration. With this, the artist is considered the product of this sector, with music being internally a promotion strategy, generating new commercial synergies. The strengthening of the concert and music festivals sector is the result of this reorganization, which works well both on the supply side and the demand from the public.

Simultaneously, economic processes have led to a greater link between financial markets around the world, producing a cultural, social and economic proximity between countries never seen before. In this sense, several companies and organizations take advantage of this setting to launch into other territories, expanding their consumer base and increasing their profile and profit. After this process matures in the more traditional economic sectors, it also reaches the music festivals, as the study demonstrates.

This work confirms some theoretical propositions in research areas of Cultural Industry and Internationalization Strategies, adapting them to the music sector and music festivals. It is concluded that the process of internationalization in this economic field is best done in a phased way, guided by the Uppsala model as the most appropriate entry mode that reduces the risk of failure in the market of choice and is the most convenient for the company that owns the festival. Two of the study respondents created a joint venture to internationalize their festivals in the destination country, but this is not a representative sample of the entire industry, given the plurality of possibilities brought out within the study itself. Another important determination is that the choice of territory is made to prioritize the economic factors of the target territory. These results are an important contribution to both academic and cultural management.

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