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Two Paths to Post-Pandemic Sustainability: Comparing a Non-profit and a Commercial Music Festival — The Cases of Glastonbury (UK) and Strawberry (China)

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Abstract

The Glastonbury Festival (UK) and the Strawberry Music Festival (China) are taken as the two cases in this study to explore the paths to the sustainable development of music festivals after the pandemic. A qualitative comparative case design is used, and publicly available documents from organisers, industry reports and the media are analysed through qualitative document analysis and thematic cross-case comparison. Based on the above data, Glastonbury has raised funds through ticket rollover and a paid livestream for its charity partners, as well as long-term charitable alliances, but is still limited by the site's capacity. On the other hand, the Strawberry Music Festival used platform live-streaming for short-term revenue and, after reopening, went multi-city; it did not establish a stable online business and was still subject to market fluctuations. Given the differences in policy cycles and market scales of the two countries, the lag in recovery is not solely due to organizational structure. This paper believes that the foundation of sustainability is not to replace the live experience with online dissemination, but to integrate charitable partnerships, community trust and ticket design into daily operations and have the online media support the live event. The comparison is not ideal; the foundation for this study is uneven, and the data in the Strawberry case are based on organizer reports and lack the extensive environmental and social documentation available for Glastonbury, so the results should be interpreted cautiously.

Keywords

Music Festival; Sustainable Operation; Organisational Legitimacy; Platformisation; Comparative Case Study.

1. Introduction

On March 18, 2020, Glastonbury announced the cancellation of its 50th-anniversary edition, and the festival was again cancelled the following year (Glastonbury Festivals, 2020–2024); similarly, the Strawberry Music Festival also suspended its offline activities in early 2020. For festivals, the problem was not only lost revenue but also that the suspension of crowd assembly violated the prerequisites for such events. What happened next was different; this shows us that sustainability in the event industry has achieved some results. Glastonbury used the two income-free years to maintain contact with ticket-holders, charity partners and the media. Strawberry was also raising online traffic during this time, had conducted five-day livestreams in February 2020, and then, after the restrictions eased, expanded rapidly to new cities. Compare the two responses in this paper and determine the reasons for their existence. It is not a list of rankings; instead, it is a way to learn what each organisation can and cannot learn from others.

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The two cases are from different places, and the reasons for comparison need to be provided. Glastonbury has been held at Worthy Farm in Somerset, England, since 1970 by the Eavis family, and the profits are donated to the three charity partners: Oxfam, Greenpeace and WaterAid. Strawberry was founded in 2009 by Modern Sky and is now a multi-city touring commercial brand. Neither is a registered non-profit organization; Glastonbury is considered a charity-supported independent festival and does not qualify as a non-profit organization, but Strawberry is treated as a commercial enterprise. The two are presented to address a particular question: In the event of a loss of income, what resources can an organisation with charitable and community-embeddedness mobilize, what can an organisation known for its brand and distribution raise, and at what cost? Section 2 is the analysis of terms: festival sustainability, organisational legitimacy, platformisation and liveness. Section 3 Introduces the document-based method and its deficiencies. Section 4 introduces the two cases, Section 5 presents them as the two logics of resource conversion, and Section 6 concludes.

2. Literature and Theory

Sustainability in the study of festivals is not only about money. Getz (2010) lists the various purposes of festivals—economic, social-cultural and ecological—and thus organisers must balance finances, communities and the environment rather than pursuing a single objective. Therefore, Framing needs to address the problems of the pandemic: no income, dispersed communities, and frozen environmental commitments at the site. It also offers the results of this study: a festival is considered sustainable not when it maximises short-term revenue, but when it can continue to attract people, raise funds, and enjoy social support.

Therefore, the two models show different levels of resilience due to a lack of organisational legitimacy. Suchman (1995) is thought to be a general idea or assumption of how suitable, appropriate and reasonable the behaviour of an institution is in terms of the social system of norms, values, beliefs and definitions; he has classified this into pragmatic, moral and cognitive types. Festivals are supported by both public support and local government approval; charitable distributions and environmental activities build moral legitimacy, and services to the local economy and festival visitors create practical legitimacy. Cognitive legitimacy is the degree to which an organisation is perceived by the public as part of a familiar group, and Glastonbury is considered a 'national institution' in Britain, and Strawberry is a 'content brand'. Legitimacy does not bring in money in good times; instead, in times of crisis, it determines who is shown leniency and cooperation for debt forgiveness and whose price increase is deemed reasonable. That is the theme of the Glastonbury study.

Three ideas are used carefully in the live-streaming. Media events (Dayan and Katz, 1992) refer to ceremonial broadcasts that interrupt daily life and gather people, but their prototype is the national television system, and whether platform-era live streams still have this feature needs to be investigated case by case. Platformisation (Van Dijck, Poell and de Waal, 2018) refers to the transformation of content into infrastructure for traffic distribution and commercialisation by platforms; once this performance is in the platform logic, revenue is linked to traffic, advertising and conversion rates. In China, the absorption of cultural production into platform infrastructure and its governance system has been cited as a characteristic feature of the country's cultural industries (de Kloet, Poell, Zeng and Chow, 2019). According to Auslander (2008), liveness is not a feature of the medium but a cultural system for experiencing an event as it occurs; therefore, a livestream can have some functions of a live event but does not simply replicate liveness; rather, it negotiates liveness. Frith (2007) provides the evaluation criteria, and the social function of live music is to gather people for a time. Evaluate the participatory promise of bullet comments (danmu) and tipping in light of this norm, do not assume it, and

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ask the question to be asked of any shutdown-era livestream: Did it have these functions, and who paid for them?

3. Method

This paper uses a comparative case study of the public documents. Cases were selected based on the most-different principle (Przeworski and Teune, 1970) to highlight the differences in operating logic; however, national institutions, market size and policy cycle are confounding factors that cannot be eliminated, so the paper does not attribute the different outcomes of the two festivals to a single variable of organisational form.

Retrieval covered January 2020 - June 2025. In English, 'Glastonbury Festival' was combined with 'cancellation', 'ticket', 'charity' and 'livestream', and in Chinese, '草莓音乐节' (Strawberry Music Festival) was combined with '疫情' (pandemic), '线上直播' (livestreaming), '复苏' (recovery) and '取消' (cancellation), along with '宅草莓' (the festival's livestreamed edition). The first sources were the organisers' websites, official announcements and press conference statements, and their sources and applications are listed in Table 1. The leaders of the media's news reports were cross-checked with the organisers' statements, unverifiable figures were excluded, and organiser-reported figures without third-party verification were only used to indicate the order of magnitude. Evidence of festivals is frequently organiser-reported; therefore, this paper will directly address this problem instead of ignoring it.

Themed coding of 'resources, strategies, outcomes, costs' and types of legitimacy was used in the analysis to identify how organisations justify themselves in the texts. One point of reflexivity: The study did not expect the difference in recovery speed to be due to organisational type. Only after checking the industry bulletin for the schedule of large-event reopenings in both countries—mid-2021 for the UK and late 2022 for China—was the policy environment considered an independent issue that needed to be addressed, and thus, the interpretation here is relatively cautious. Another limitation is that public documentation of the environmental and social aspects of Strawberry is scarce; thus, the Getz framework could not be applied symmetrically to the ecological dimension, and the comparison is not favourable for Strawberry. Therefore, this should be viewed as a data deficiency rather than an inherent characteristic of the commercial model.

Table 1. Data Sources and Applications

Case	Data type	Main sources	Usages
Glastonbury	Official archives and statements	Festival website history and news pages, organiser announcements	Ticketing arrangements, charity data, livestream details
Strawberry	Organiser statements and media reports	Modern Sky press statements, Chinese media reports, industry-association briefings	Livestream reach, market context

4. Case Analysis

4.1. Glastonbury: Sustaining Trust Through Ticketing and Charity

2020 was to be Glastonbury's 50th anniversary year. Following the cancellation announcement on March 18, the festival was again cancelled in 2021; thus, there were two consecutive years of zero income and an existential crisis for the family business without corporate support

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(Glastonbury Festivals, 2020–2024). The organisers stabilised ticketing first: deposits for tickets to the cancelled editions were rolled over to the next edition, a refund window was provided after each cancellation, and most ticket-holders kept their bookings (Glastonbury Festivals, 2020–2024). The money was used to support the festival during the two income-less winters. Read analytically: Rollover converted the audience into voluntary creditors by offering an interest-free loan, as the ticket holders expected the festival to be held again and wished to attend. Tickets sold out quickly when the festival returned in 2022, although pent-up demand from the two years without live shows is also a reason.

In May 2021, the organisers of Live at Worthy Farm produced a five-hour paid live stream featuring performances by Coldplay and Wolf Alice across the farm's grounds, which were broadcast in time-zone-specific feeds around the world at £20 per ticket and raised funds for the three charity partners and the 2022 return (Glastonbury Festivals, 2020–2024). According to Dayan and Katz (1992), it was an effort to maintain a sense of ceremony through images by relocating the camera at the Pyramid Stage and Stone Circle for distant viewers. However, the broadcast was a paid, region-locked one for the existing fan base, and not the national television event mentioned in the theory. The production of collective moments continued, but the extent of their public life had noticeably declined. Another feature of the business model is that, unlike Strawberry, Glastonbury raised £20 from its fans to cover the expenses of a tour, and Strawberry charges platforms for access to its audience.

In June 2022, the festival returned to a licensed capacity of about 210,000, including staff and performers, and tickets were raised from £265 to £280 (Glastonbury Festivals, 2020–2024). There was no public protest over the increase; therefore, the people of the nation may have developed a sense of security through repeated practice and recovery from the pandemic. The basic mechanism is in daily life. Volunteer stewards and litter crews from Oxfam, Greenpeace and WaterAid have long been involved in production, providing charity supplies and festival reach, and each other enhances the public image. In collaboration with the 'Love the Farm, Leave No Trace' initiative, the charity will also provide volunteers and bolster public confidence and a competitive edge. Cognitive legitimacy also has a quiet effect; because Glastonbury is a national institution, the rollover and price increase were seen as reasonable by the public.

There is a cost of the model, and this cost is fixed. Limited expansion of licensed capacity: Worthy Farm has a fixed licence and thus cannot increase supply according to demand. Ticket scalping and secondary-market problems occur at every event. In a normal commercial logic, the answer would be to raise prices until the demand decreases; however, the post-hiatus rises have not been sustainable for younger festival-goers. Interestingly, Glastonbury is not based on this type of reasoning for its end either. It is not unreasonable to price below the market-clearing rate; there is still a psychological benefit of the festival. A 'national institution' that limited access to the top bidder would soon be perceived as a luxury item, and the patience of the rollover scheme relies on the belief that the festival is not mainly about making money. Organisers have announced that 2026 will be a fallow year for the recovery of the site, good land management and a second planned revenue gap in the commercial sense, and it is also another sign that growth is being sacrificed for sustainability (Glastonbury Festivals, 2020-2024). One question this paper cannot answer is whether the charitable distribution is driven by altruism or brand strategy; public documents are unavailable for this purpose, and thus, only the effects can be reported in this paper.

4.2. Strawberry: Platform Livestreaming and Offline Expansion

In 2020, Strawberry moved the performance to a platform as soon as possible. From February 4 to 8, Modern Sky held the livestreamed edition of the Strawberry Music Festival's "Home Strawberry Is Not a Festival" (Zhai Caomei bushi yinyuejie) on Bilibili, and over five days, seventy performances were presented by combining recorded materials from the 2019 event

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with home-recorded sets. According to its own data, the total number of views for Modern Sky exceeded one million (as reported by Sohu, 2020); however, these figures are organizer-reported and have not been verified by third parties, so the paper only uses them to show the scale. Streaming services are free to watch and generate income through partnerships, advertisements, and donations from users. In terms of platformisation (van Dijck, Poell and de Waal, 2018), the performance was plugged directly into an infrastructure of traffic distribution and commercial conversion; monetisation was faster than at Glastonbury, but it was the monetisation of attention, arranged business-to-business, and it left the relationship between the festival and the audience unchanged.

Livestreaming was an emergency response, not an innovation. In the time that followed, no other livestream of this scale has been recorded in public sources, and streaming has never become a stable business model; there are no subscriptions for retention, no archives for licensing, and the platform deals are one-off purchases of traffic rather than capabilities the festival has built. Platform partnerships provided cash flow during the shutdown; the rapid recovery of China's offline live-streaming market had other reasons, such as adjustments to pandemic controls and local-government stimulus for cultural consumption. Recovery due to 'platform changes' overemphasises the role of the online strategy.

Glastonbury's lack of a broadcast is instructive in terms of assets. A well-known online business needs to own some assets in the digital chain, such as the rights to the footage, a direct subscription relationship with viewers, or artist contracts for multiple events. What the platform provided in return was use of the rented facilities; distribution, payment and the audience all belonged to the platform, and the festival kept what platforms do not price: the symbolic value of the brand. Platformisation is the difference between using an infrastructure and owning it (van Dijck, Poell and de Waal, 2018). After the end of the shutdown, attention had moved away from Strawberry, and only a few lasting assets from the streaming episodes and goodwill and production experience remained.

Strawberry chose expansion after reopening. New editions appeared in 2023 across second- and third-tier cities following the expansion of the market; according to the China Association of Performing Arts, large-scale concerts and festivals generated 20.171 billion yuan in box-office revenue in 2023, an increase of 373.6% from 2019, and the proportion of activities outside the major cities was also rising (CAPA, 2024). Strawberry has been rolled out in many cities and is now a trend in the industry; local governments are using it to boost consumption, and the brand has the production capacity to meet this demand. The risk is in the same place as the growth. With the increase in supply, standardised lineups and interchangeable city editions have reduced the single-event experience and brand premium; therefore, when sentiment declines, the expansion built on this sentiment is the first to be affected. Each edition is also loosely associated with a host city; it is simpler to organise, cancel or replace.

5. Discussion

The two cases are comparable in their use of resources. Glastonbury's accumulated public trust was transformed by Suchman (1995) into the patience of ticket-holders, the cooperation of charity partners, and media goodwill; Strawberry turned brand recognition and platform channels into a popular livestream collaboration. The former is not limited by geographical location or capacity issues, and the latter is flexible but also subject to changes in market demand. However, the two differences cannot be considered strengths of either side: the rhythm of public health in these countries was different, so the timing of recovery cannot be attributed to the organizational form, and they operate at very different scales of audience and revenue, thus their cost structures are not directly comparable.

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There is also a difference in the time span of the assets used by the models. Glastonbury has been building a long-term asset of trust over the past 50 years by taking good care of ticket holders, supporting various charities, and participating in national life. The crisis years used up that reserve. Strawberry's assets were not of that kind; although it had drawn people's attention and built good channels for quick money in a developing country, there was no guarantee of continued interest. During the pandemic, resource-rich organisations received more support; for instance, a company with a large reserve of goodwill could operate at a loss for two years without harm, but one living on current liabilities had to suspend transactions. According to Suchman (1995), moral legitimacy is slow to develop and expensive to obtain; at the same time, pragmatic utility changes frequently.

Cognitive Classification also has a good effect. As a "national institution", Glastonbury can increase deposit rollover and raise prices reasonably; however, as a "content brand", the streams at Strawberry are presented as entertainment rather than rituals, and thus moral legitimacy is not built up. It should be noted that Strawberry's pandemic-era "Home Strawberry" companionship narrative did gain a moment of moral authority but was never transformed into a long-term charitable mechanism, and the result was different from Glastonbury's integration of charity into organisational routines. The Institutions in each country are also different. Glastonbury's public profile is also due to many years of national television coverage and Britain's well-established charitable-volunteer system, which are not available to all charity-based festivals; Strawberry's revival was enabled by local government consumption policies and the platform economy (de Kloet, Poell, Zeng and Chow, 2019). The results are best viewed as a comparison of the two logics of resource conversion, not an applicable model.

Table 2. Two Logics of Resource Conversion

Dimension	Glastonbury	Strawberry
Core crisis strategy	Deposit rollover + paid livestream	Free platform livestreams
Cash-flow sources	Legacy ticket money, paid streaming, sponsorship	Platform deals, advertising, tipping
Legitimacy base	Moral legitimacy (‘national institution’)	Pragmatic legitimacy (‘content brand’)
Role of online business	Extension of live ritual, fundraising for return	Emergency monetisation; no durable business
Recovery path	Moderate price rises under capacity lock	Multi-city replication
Main costs	Growth ceiling, ticket rushes, secondary market	Dependence on market heat; weak community ties; homogenisation

The two models have different limitations, and thus the concepts of sustainability are also different. Glastonbury cannot expand the size of the site; given the increase in ticket prices and reduced availability, the spirit of "open to all" will gradually disappear, and the 2026 fallow year will show whether the audience is willing to accept a planned hiatus. Strawberry can be reproduced quickly, but without deep local roots, the model will be vulnerable to any cooling of market sentiment. Glastonbury is a typical case of charity-integrated festivals; to diversify

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income, integrate charity into the operating system rather than just adding an announced donation amount, design ticketing that meets both cash flow and community needs, and treat the online platform as a supplement to the live event rather than a replacement. The model is used for configuration.

6. Conclusion

First, how can the accumulated public trust and platform channels be used to provide a life and recovery for people? Glastonbury chose to preserve cash through deposit rollover, held a paid broadcast for its charity partners to maintain visibility, and established a charitable network to retain trust, but at the expense of growth constrained by capacity. Strawberry quickly monetised through platform live-streaming and then expanded to multiple cities, but failed to establish a sustainable online business and its development was tied to the broader market. What charity-embedded festivals can learn from Glastonbury is not about the charity, the farm or the broadcast coverage, but the structure: charity embedded in operations, ticketing serving the community and cash flow together, and the online as a complement to the live event. As shown in the comparison, the charity-embedded path is not always superior; a fast-asset model is suitable for organisations in developing markets with weak capacity constraints, and its costs are relatively low when the growth rate declines. Organisers need to know what resources are available in practice and when they will be obtained.

The Deficiencies are evident. All data are from public texts, and the attitude and consumption behaviour of festivalgoers themselves have not been observed; the two cases differ in country and market size, so conclusions must be drawn cautiously; and other stakeholders, artists and ticketing platforms, are also absent. Future research could conduct surveys or interviews with the audiences of both settings to explore how shutdown-era online participation influenced their subsequent loyalty to live events, or compare charity-embedded and commercial festivals in a single country to eliminate institutional confounders.

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