

Final report

Taking the Temperature

A roadmap for recovery: governance,
infrastructure, and self-reliance

March 2020 - November 2021

A study of India's creative economy
and the deep impact of Covid-19

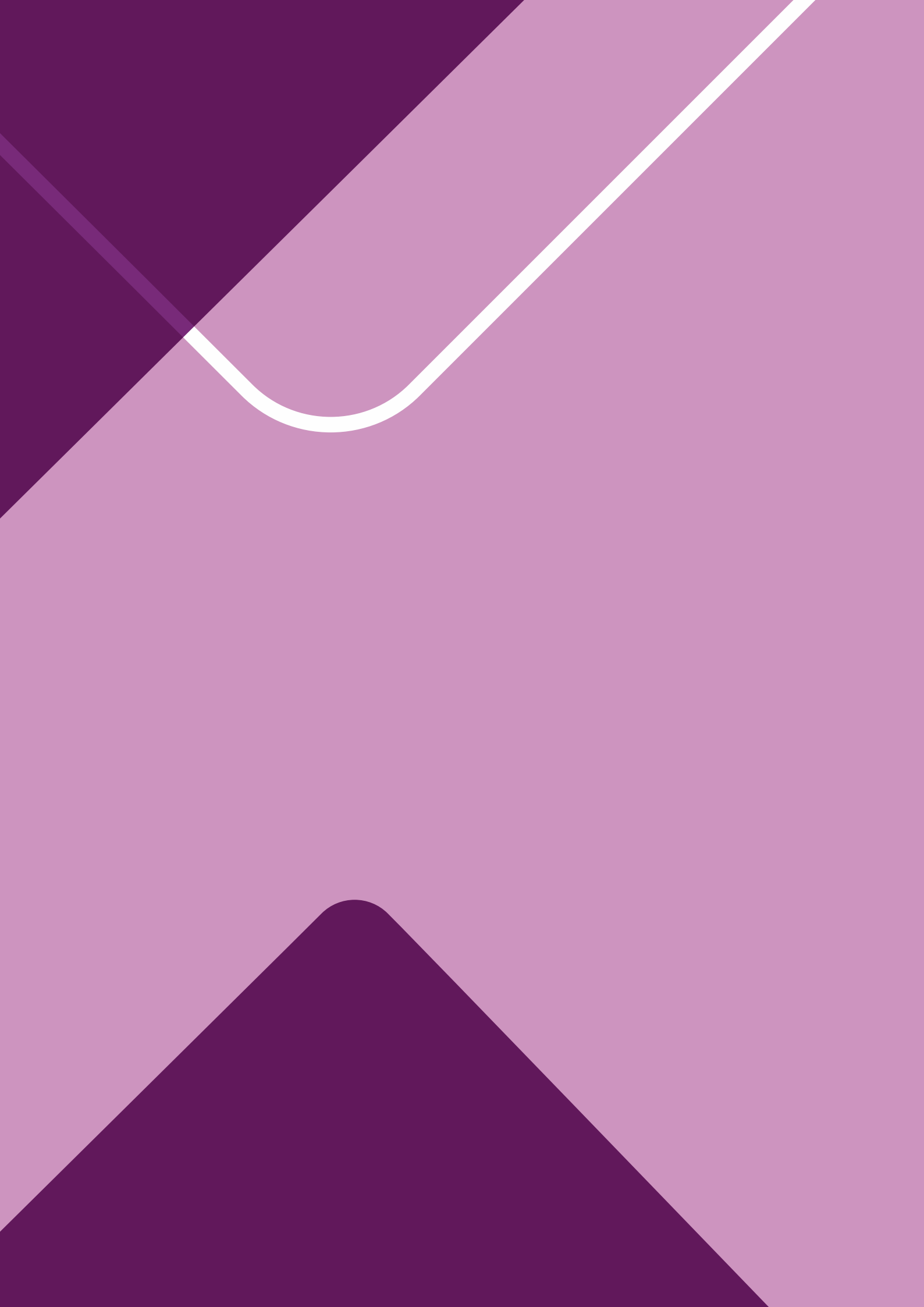




Contents

| | |
|---|-----------|
| Preface | 5 |
| Partners | 7 |
| Acknowledgements | 8 |
| Executive summary | 9 |
| Key research findings | 10 |
| Recommending a roadmap for recovery: governance, infrastructure, and self-reliance | 11 |
| Contribution to India's GDP from the Creative Economy and Culture Industries | 14 |
| Survey 3: Primary research survey | 23 |
| Case studies | 33 |
| Arts and culture: literature review | 40 |
| Research methodology | 54 |
| Limitations | 56 |
| References for the market sizing framework: (Chapter 1) | 57 |
| Annex | 61 |





Preface

The '*Taking the Temperature*' research is a first-of-its-kind, landmark longitudinal report on the impact of the Covid-19 pandemic on India's creative economy.

The research has been developed by the British Council, in partnership with the Federation of Indian Chambers of Commerce and Industry (FICCI) and the Art X Company. Direct input to this final report has been provided by the Smart Cube consultancy.

This report, for the very first time, gives the size and scale of the creative economy and its contribution of the culture industries to national Gross Domestic Product (GDP) and wealth creation in India. This is the third and final 'Taking the Temperature' report of a three-phased tracer study. The report provides a consolidated mapping, through three consecutive surveys, of how India's culture sector has been responding to the pandemic and related lockdowns from March 2020 to November 2021.

The report provides robust insight on the:

- size of the creative economy to India's GDP and the scale of the current recession in the creative industries precipitated by the pandemic
- depth and scale of impact of the pandemic and the crisis in creative sectors, arts companies and individual artists
- comparisons, developments and changes over a sustained period from March 2020 to November 2021
- changes being taken to strengthen the creative economy, during and post Covid-19
- recommendations needed for emergency and long-term development of the creative economy.

It provides a comparison of the situation in India since the outbreak of Covid-19, the consequent national lockdown (March-June 2020), the period following relaxation of the lockdown (July - October 2020) and reports on the second devastating wave of the pandemic (April - June 2021).

In recognition of the global value and impact of the creative industries to wealth, wellbeing and livelihoods, in November 2020, the United Nations declared 2021 the '**International Year of the Creative Economy for Sustainable Development.**' The British Council is a partner for this programme.

The report provides a consolidated mapping, through three consecutive surveys, of how India's culture sector has been responding to the pandemic and related lockdowns from March 2020 to November 2021.

Since 1997 and the inception of the Department for Digital, Culture, Media and Sport, Britain has mapped the creative economy of the United Kingdom (UK) and its economic worth to the national GDP. The tax system of the UK's formal economy encodes and embeds the creative industries, in order to measure the value to GDP. This enabled the UK government to take quick action at the onset of Covid-19 to invest in emergency grants and the furlough scheme to support arts industries and arts employees during the pandemic. The report uses definitions of the creative economy and creative industry.

The first edition of 'Taking the Temperature' report provided a snapshot of the situation in India since Covid-19 and the lockdowns, the second edition of the 'Taking the Temperature' report looks at the depth and scale of the impact of the pandemic, and studies the developments, actions, and recommendations that will strengthen the creative economy.

Taking the Temperature report 3 - the final report of the series - tracks the longitudinal impact of the pandemic on the creative industry and identifies a way ahead in a systematic and sustainable roadmap for recovery. The research records major changes to the sectors and businesses precipitated by the pandemic in India. Originally, the survey was to remain open for four weeks, but due to the severe impact of the pandemic during the intervening months of April to June, across the country, the deadline for responses was extended. The online survey link was open from 17 March to 11 June 2021.

The final edition of the Taking The Temperature tracks the longitudinal impact of the pandemic on the creative industry and identifies a way ahead in a systematic and sustainable roadmap for recovery.

The creative economy

knowledge-based

economic activities upon which the creative industries are based.

Creative industries are those which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.

Creative industries

comprise sectors like

advertising, architecture, arts and culture festivals, crafts, design and fashion, literature and publishing, museums, heritage and public monuments. They also include new media arts such as gaming, film and video, performing arts like music, dance, theatre, public and street art, television and radio, venues including theatre, cinema, galleries and parks, and visual arts such as painting, illustration, photography and sculpture. Together these make an important contribution to the national wealth creation and international reputation of any country.

Partners

British Council

The British Council is the UK's international organisation for cultural relations and educational opportunities. We work with over 100 countries in the fields of arts and culture, English language, education and civil society. Last year we reached over 80 million people directly and 791 million people overall, including online, and through broadcasts and publications. We make a positive contribution to the countries we work with, changing lives by creating opportunities, building connections and engendering trust. Founded in 1934, we are a UK charity governed by the Royal Charter and a UK public body.

www.britishcouncil.in

Federation of Indian Chambers of Commerce and Industry

Established in 1927, the Federation of Indian Chambers of Commerce and Industry (FICCI) is the largest and oldest apex business organisation in India. Its history is closely interwoven with India's struggle for independence, its industrialisation and its emergence as one of the most rapidly growing global economies. A non-government, not-for-profit organisation, FICCI is the voice of India's business and industry. From influencing policy to encouraging debate, engaging with policy makers and civil society, FICCI articulates the views and concerns of industry. It serves its members from the Indian private and public corporate sectors and multinational companies, drawing its strength from diverse regional chambers of commerce and industry across states, reaching out to over 2,50,000 companies. FICCI provides a platform for networking and consensus building within and across sectors and is the first port of call for Indian industry, policy makers and the international business community.

www.ficci.in

The Art X Company

The Art X Company's mission is to enable and articulate value for the arts and culture sector in India through data-driven insights, strategy-led impact, and audience outreach. A strategic consultancy operating at the intersection of arts and access, Art X Company offers consulting, research, curation, audience development and management services to the cultural sector in India. They also run Arts & Culture Resources India (ACRI), a network of 58,000+ creative professionals, and nurture this community through a Facebook group and a membership base. The Art X Company has worked extensively across India for a range of clients in the for-profit as well as non-profit and government spaces. The organisation comprises a group of highly passionate arts managers, strategists and researchers, with presence in Mumbai and Bengaluru.

www.art-x.co | www.indiacultureacri.in | www.cultureconindia.com

Smart Cube

Smart Cube does custom research and advanced analytics to transform data into insights.

www.thsmartcube.com

Acknowledgements

The partners thank the 1040 arts and creative industries organisations and individuals for making time to complete the survey during this most challenging period, and for sharing valuable insights on the experience of working during the Covid-19 situation. The partners are grateful for the support received for the development and distribution of survey 1 to 3 among arts and cultural networks in India. All told, the creative industries took 47 hours of their precious time to complete three rounds of the surveys over almost 18 months.

Survey 1

- The Craft Revival Trust for strengthening the research by widening access through translating the survey into Hindi, Bangla and Tamil
- The Department for International Trade (DIT)
- The Event and Entertainment Management Association (EEMA)
- The Association of Indian Publishers
- Impulse NGO
- The Crafts Council India
- The Charles Wallace India Trust
- The Japan Foundation, India
- The North India Section of Textile Institute (NISTI)
- The Arts and Culture Resources India (ACRI)
- The International Council on Monuments and Sites (ICOMOS)

Survey 2

- ARTISANS'
- The Association of Designers of India (ADI)
- Artistik Licence
- ARThinkSouthAsia (ATSA)
- Banglanatak dot com
- The Bombay Institute of Critical Analysis and Research (BICAR)
- The Jagriti Theatre
- The Ladakh Arts and Media Organisation (LAMO)
- Nrityagram
- Thus
- 200 Million Artisans

Survey 3

- The Apeejay Kolkata Lit Fest
- ARTISANS'
- ARThinkSouthAsia
- Banglanatak dot com
- Folklog
- Impulse NGO Network
- The Kalinga Literary Festival
- The Kolkata Centre for Creativity
- The National Centre for Performing Arts
- The Prabha Khaitan Foundation
- The Serendipity Arts Festival



Executive summary

Taking the Temperature: Survey Round 3 - A Roadmap for Recovery

The cultural and creative industries have been among the hardest hit sectors by the Covid-19 pandemic worldwide and in India. The impact of the pandemic has been particularly felt in theatre, live music, festivals, cinemas, galleries, museums, and the gig economy. In contrast, business in private galleries, sales of art, Virtual Reality (VR), Artificial Intelligence (AI) and gaming have grown in India during the pandemic.

The critically important 88 per cent of the Micro, Small and Medium Enterprises (MSME) in

the organised and unorganised sectors and the skilled freelance workforce across creative sectors have been hardest hit by the lockdown, social-distancing and termination of contracts. There have been 51 per cent losses to earned income and increased insecurity with move to a 44 per cent freelance workforce.

The British Council has been working for 18 months with the Federation of Indian Chambers of Commerce and Industry (FICCI) and the Art X Company to map the impact of Covid-19 on India's culture sector through a study that has been reporting its findings every four to six months. This survey is an iterative process that 'takes the temperature' of the sector every few months to track the sector as it responds to the pandemic. This major piece of unique research has responded to and adapted from the UK's acknowledged global expertise in mapping and enumerating the creative economy.

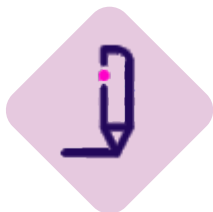
This report brings together complex and disparate data sets and triangulates them and the work of Smart Cube, a custom research and data analytic company. For the first time, it gives the size and scale of the creative economy and contribution of the culture industries to the national GDP and wealth creation in India.



For the first time, this research records the culture and creative industries' contribution to the creative economy of India's GDP and prosperity.



In line with the global trend, India's creative economy and culture sector experienced a 39 per cent recession from INR 50,000 (GBP 4.95 billion) crores in 2019-20 to INR 30,440 (GBP 3 billion) crores in 2020-21.



The contribution of the creative industries to India's GDP declined from 2.5 per cent in 2019 to 1.5 per cent in 2020 due to the Covid-19 pandemic. This resulted in a 1 per cent contraction of the total creative economy in India and major impact on individual livelihoods, arts companies and creative sectors.

Barbara Wickham MBE

Director India
British Council

Sanjoy Roy

Director
FICCI and Teamwork Arts

Rashmi Dhanwani

Director
Art X Company

Critical factors to mapping India's GDP market size. The market sizing of India's GDP is based on primary and secondary research, interviews with industry experts and the sector surveys:

- A significant part of the creative economy in India are in the formal and informal economy
- 2019-20 in India was an election year, The Government of India's focus was on the elections.

In 2019-20, the Indian economy grew by 4.2 per cent against 6.1 per cent expansion in 2018-19. Economic growth slowed to an 11-year low of 4.2 per cent in 2019-20, according to data released by the National Statistical Office on Friday, 19-Jun-2020. Disposable incomes which is part of the creative economy was the most hit.

Three key factors materially impacted the creative economy in 2019 to 2021

1. Covid 19
2. Slowing growth in India's GDP
3. Election year



Key research findings

The creative economy in India includes industries in arts and culture festivals, performing arts, crafts, visual arts, design, film and video, literature and publishing, museums, galleries and public monuments, AI, VR and gaming, broadcast and digital.

Loss to India's GDP

India's creative economy fell to

↓ **1.5%**
GDP

39%

recession in creative industries to INR 30,440 crores in 2020-21

Creative industries contraction and change

49%

of creative sectors have not been able to keep creative businesses and artistic programmes running in the financial year 2020-21

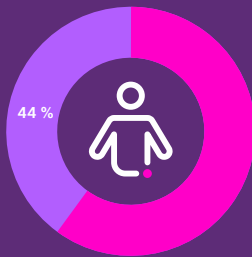
94%

of the arts sectors are now operating in 'digital only' or 'hybrid' models

27%

of the sector is generating income through digital platforms with only 8 per cent running physical programmes. However, income to performing arts and festivals through digital is a tiny percentage and has not replaced more usual sales and ticketing platforms.

Shift from employed to self-employed



44 per cent of the creative economy is now made of a self-employed

Major loss in revenue to GDP

50%

of creative sectors reported 51 per cent or more loss in annual revenue in financial year 2020-21

89%

of creative sectors in edition 2 and 82 per cent in edition 3 have confirmed the pandemic impacted their income

In edition 2 and 3, sectors have had to restructure business, sell assets and make staff redundancies

This report traces consistent overhead cuts

36%

in survey 3, compared to

41%

in survey 2 and

42%

in survey 1.

Policy omission and complex regulatory framework



The government of India in its purview does not have an overarching policy for the creative economy and culture industry.



The complex governance structure of India and its challenging regulatory framework militates against a holistic and comprehensive national or state government level response to the Covid-19 emergency such as for example through sector tax breaks, grants and loans.



Third survey of the research ran from April to June when the second wave of Covid-19 was at its most devastating to lives and livelihoods, and this report reflects that.

1. The creative economy in India includes industries in: arts and culture festivals, performing arts, crafts, visual arts, design, film and video, literature and publishing, museums, galleries and public monuments,; CreaTech (AI, VRgaming), broadcast and digital.

Recommending a roadmap for recovery: governance, infrastructure, and self-reliance

SHORT-TERM

- **Creative Economy taskforce**
 - Establish a cross-government department from the 14 Ministries that have a mandate for arts and culture in India*. This can take the form of a Creative Economy Task Force (CETF) to coordinate and plan a comprehensive and substantial package of emergency and long-term investment across arts and culture sectors.
 - Develop a mid and long-term national policy for the creative industries and arts enterprise.
 - A national media campaign showcasing the arts and culture and its impact on the creative economy, livelihoods and a self-reliant ambitious future-facing Indian economy.
- **Financial investment and innovation**
 - Maximise the potential of technology and AI through informal education networks to enable livelihoods for artists, entrepreneurs and arts innovators.
 - Government emergency grant-in-aid for MSMEs, to enable them to survive and rebuild with priority to organisations that have sold assets or face permanent closure.
 - A comprehensive national skills campaign across urban and rural geographies for creative MSMEs in digital and technological skills, business development, marketing and communication capacity.

MID-TERM

- **Strengthen infrastructure development**
 - The CETF comprising bureaucrats and politicians from the central government and states of India and major stakeholders to inaugurate a major ground-breaking international creative economy conference, convening public and private partnerships across government.
 - Establish sector specific management self-help groups and management organisations and city-wide enterprise zones and clusters in performing arts, festivals, literature and publishing, visual arts, galleries and museums, crafts, CreaTech and start-ups.

LONG-TERM

● Regulatory framework

- Review the regulatory framework to strengthen the export and import market for creative goods and services and reduce barriers to entry.
- Embed tax coding of the creative industries in the formal economy through the Goods and Services Tax (GST) council
- Review the CSR framework to develop a systematic inclusion for private investment and build a system of philanthropy for arts and culture.
- Establish arms-length bodies (ALBs) to strengthen and invest in arts and culture through a partnership of public and private investors.
- Identify common sectoral barriers to market access through policy change and implementation of innovative schemes in the regulatory framework to strengthen routes to the market





Contribution to India's GDP from the Creative Economy and Culture Industries

In line with global trends, India's creative economy and culture sector, witnessed a 39 per cent year-on-year recession from INR 50,000 crores in 2019-20 to INR 30,440 crores in 2020-21.

Contribution of the creative economy to India's GDP reduced from 2.5 per cent in 2019-20 to 1.5 per cent in 2020-21 because of the Covid-19 pandemic.

These creative industries drive the creative economy, culture sectors are interrelated and depend on each other - fashion for crafts, festivals for publishing and the performing arts, films for OTT platforms and television, advertising for radio and online etc.

These important interrelationships between sectors are critical to economic sustainability and growth of the creative economy and livelihoods.

India's self-reliance and innate arts entrepreneurship will play an important role in shaping the creative industries in the coming year. But substantial concerted government and business intervention and investment for the arts is critically needed now.

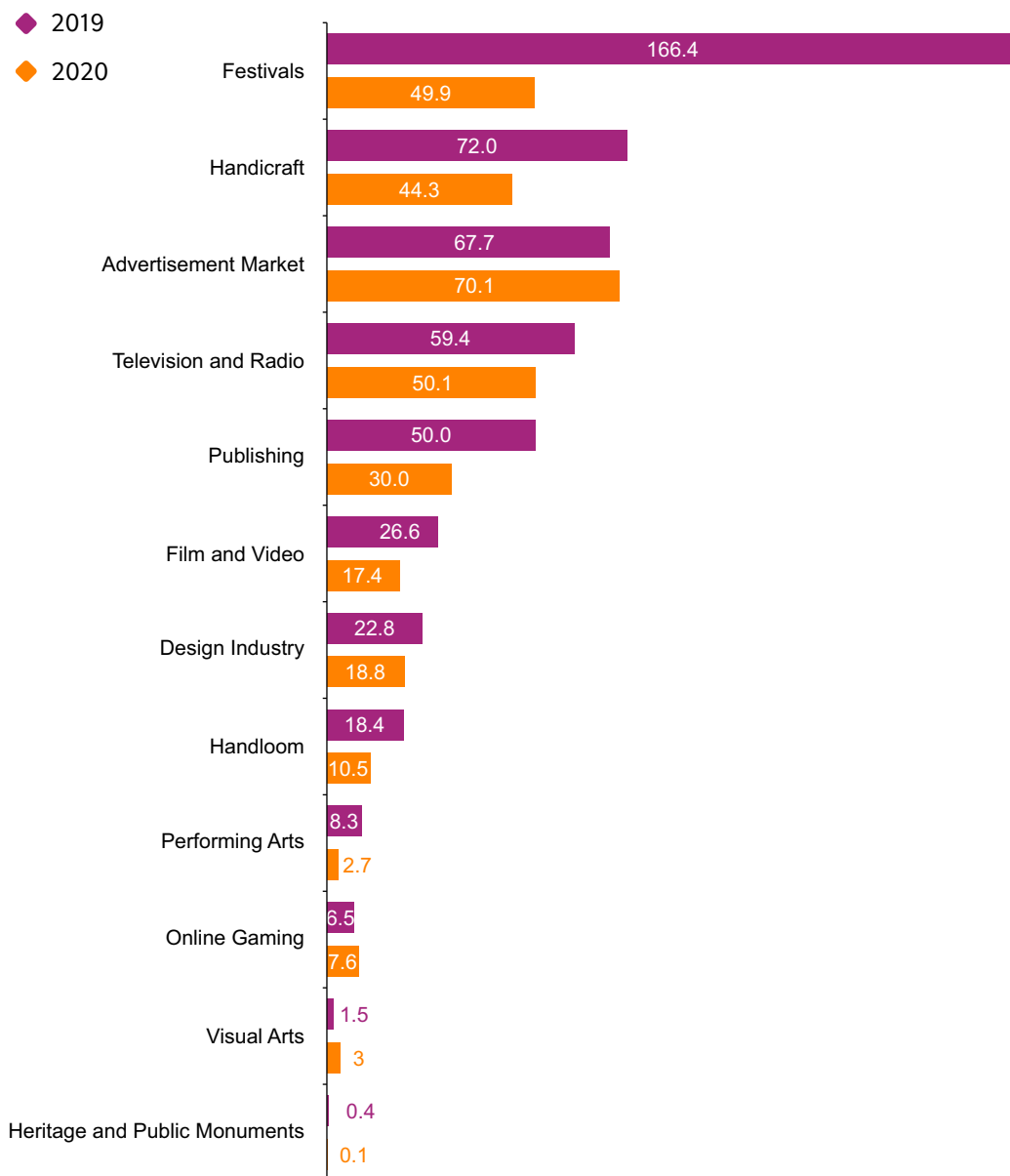
Public and private corporate support must provide impetus to the survival of the creative economy for India's arts and culture.

Market size of the creative economy and culture sector, by segmentation

The Indian creative economy and culture industries include 12 major segments:

1. Performing arts
2. Fashion and design
3. Craft and handloom
4. Visual arts including galleries and auction houses
5. Arts and culture festivals
6. Literature and publishing
7. Museums, heritage, and public monuments
8. Architecture
9. Advertising
10. Film and video production
11. Television and radio
12. AI/VR and gaming

India's Creative Economy and Culture Sector Market by subsectors



Performing arts

The performing art sector (only the organized sector) declined by 67.5 per cent in 2020. Most of the revenue in this sub-sector is mostly received during October to March season, the festive season in India. However, complete lockdown across the country has resulted in low to zero revenue during this time.

Live events, were perhaps, the hardest hit of all the sectors, despite numerous attempts to digitalize its offerings, which is still at a nascent stage, not even a small fraction of revenues were recovered through the digital medium. Even though artists turned to online shows with no monetary support and in some cases they were not even paid for their digital performance.

Most of the artists (especially where there is no scope for online work such as Lighting artists and Instrument makers) are sitting idle since March 2020, on top of it, the second wave of COVID-19 has worsened the already miserable condition of artists in India

To offset the losses, companies came up with innovative ideas to engage the audience and to offset their losses. Third-party reservation companies such as BookMyShow started curating stay-at-home experiences and looking to work out some sort of a financial model for itself and the performers it features. It's new offering, BookMyShow Online, is entirely dedicated to hosting and facilitating music, comedy, and entertainment events. Also, it has collaborated with Entertainment Company Live Nation, Vodafone, NCPA, Big Bad Wolf Entertainment, among others to livestream music, theatre, stand-up comedy, and fitness sessions.

The industry overall lacks cultural policy, government support and collaboration; also, tax breaks or subsidies for artists and craftsmen should be removed.

Design Industry

The design industry sector was at INR 1880 crores, witnessed a decline of 17.5 per cent in 2020. It includes graphic designs, industrial design, animation designers, interior designers, fashion designers, UI/UX designers; new media/ animation, architecture, fashion design, and interior are leading domains within the design industry.

The majority of design companies are located in 4 cities viz. Delhi, Bangalore, Mumbai, and Pune. Additionally, education specific to different types of designing has been surging in the last 5 years with the involvement of various private institutions; till, before 5 years, the education landscape catering to designing was headed by very few public institutions only.

Further, there has been a significant trend visible in this industry as many Indian Design companies are actively collaborating with international design companies to expand their service portfolio within diverse design disciplines; also, many international design companies are setting up their infrastructure in India, focusing in the area of communication and branding.

Visual arts market and galleries

- The visual arts market, online gaming, and advertisement market witnessed a growth of 100 per cent, 17 per cent and 3 per cent respectively in 2020.
- The visual arts market experienced a 100 per cent growth in 2020 with a market value of INR 270 crores. Visual arts include revenue from art galleries and auction houses and revenue is derived from various physical forms of art, including paintings, sculptures and miniatures.



“Production of artwork was initially limited. But now artists are working on paintings in small volumes. Auctions on the other hand are a whole different matter. Many world records were broken between September 2020 to April 2021 and April 2021 saw auction sales of INR 260 crore. The sales are good because a lot of people have made money in business and lots of people have pulled out from alternate investments and placed them in art, which is more secure.”
 – Ashvin Rajagopalan, director, PIRAMAL Foundation of Art

- While there are several noted art galleries and auction houses that account for majority of the formal art sales in India, there exists an informal category with numerous art dealers and galleries across the country whose sales are not accounted for, and sales data from such dealers is not available.

Arts and culture festivals

- The festival sector had a market size of INR 5,000 crores in 2019-20 which declined by 39 per cent in 2020-21. It includes revenue (overall economic impact) generated from the hotel, Food & Beverage (F&B), delegates, sponsorships, rental, transport and miscellaneous expenses incurred by the festival-goers.
- The decline of the festival sector further impacted the crafts sector as annual craft fairs were cancelled, blocking a major source of income of crafts persons.
- One major international literature festival recorded 27.5 million audiences face-to-face and online, compared previously to 500,000 for face-to-face edition pre-Covid-19, but an 80 per cent drop in ticket and sponsorship income.

Museums, heritage and public monuments

- The heritage and public monuments industry sector which had a market size of INR 91 crores, faced a decline of 76 per cent in 2020-21. It includes revenue generated from the sale of tickets from centrally protected monuments/ sites and museums. This sector which generates 70 per cent of the revenue during September to December was mostly shut around the year 2020.
- The Taj Mahal, the biggest tourist attraction in India, saw less than 1 per cent of international tourists amid visa and international flight restrictions in 2020. In contrast, Taj Mahal earned INR 65 crores in revenue with more than 5 lakh foreign visitors in 2019. To offset the losses, monuments are planning to increase the ticket prices in 2021. For example Indian tourists, currently paying INR 50 for an entry ticket for the Taj Mahal, will now have to pay INR 80, while foreign tourists will have to shell out INR 1,200 instead of INR 1,100.

Advertising industry

- The advertisement industry which had a market size of INR 7,000 crores, saw a rise of 3.5 per cent in 2020-21. It includes advertisement revenues generated from digital and over-the-top (OTT) media, out-of-home, TV, films (in-cinema ads), and print.
- The Indian advertising market is among Asia's fastest-growing advertisement markets after China. The increasing penetration of 5G internet and smartphones in the country is



"Just the exhibition sector has lost 1,500 crores from March-end to mid-September. The total figure across Bollywood is massive. You have to take the interest rates, salaries being paid, maintenance charges and so many other things into account. Add this to the people who have lost jobs and maybe more will lose even further. And then, we have no support from the government. It's a case of an economic pandemic and not just a medical pandemic. It's extremely scary and the government must step in, immediately. High taxes are paid by this industry and the employment created in our sector is huge. The entertainment sector needs to be viewed with priority."

**– Akshaye Rathi,
exhibitor-distributor
(September 2020)**

boosting the use of digital advertising, which is expected to pave the growth of the market in India. Moreover, the Olympic Games and the One Day International (ODI) cricket series in 2021 proved to be a major contributor to the growth of the overall market in the country.

- During Covid-19, advertisement spend saw an increase in the number of advertisers across sectors post-October 2020 (as compared to pre-Covid-19). However, Covid-19 accelerated the shift to digital, so the share of digital advertising is expected to grow to 15 per cent - almost two years ahead of earlier projections. The recovery for this industry was led by an increase in the number of advertisers and the entry of new-to-TV advertisers (such as White Hat Jr Technologies and Practo).

Film production

- The film and video production industry which had a market size of INR 1,740 crores in 2019-20, saw a decline of 34.5 per cent in 2020-21. The decline included fall in revenues from domestic and international markets, broadcast rights, OTT rights and video distribution online via audio, news, social media and OTT platforms
- There has been significant growth in the consumption of online streaming services, such as JioCinema, Disney/Hotstar, Netflix, Spotify, JioSaavn, and Apple Music .
- Bollywood incurred huge revenue losses in 2020-21. 441 films were released during 2020-21 in comparison to 1,833 releases in 2019-20 on account of lockdown and social distancing norms announced due to the Covid-19 pandemic.
- Industry experts believe the loss is in the range of INR 5,000 crores and are anticipating a similar situation in 2021 as shoots are coming to a halt in some cities. There is also opportunity in terms of new shooting locations such as the upcoming Uttar Pradesh Film City.
- Some losses were offset by movies released on OTT media because of cinema closures.
- Some film studios chose to fast-track new releases to OTT platforms to offset losses from cinema closures .

Television and media

- The Indian Media and Entertainment sector fell by 24 per cent to reach INR 1,38,000 crores in 2020-21. Historically, media and entertainment as a sector has grown and often outperformed India's nominal GDP. However, the sector fell three times lower than India's nominal GDP due to the discretionary nature of the spend. Subscription revenues proved their mettle by holding up better than advertising revenues.
 - The television and radio industry sector which had a market size of INR 5,010 crores, saw a decline of 15.7 per cent in 2020-21. It includes all public service, commercial, cable and satellite TV and radio, including the production and broadcasting of programmes, and radio advertisements. Further, animation, VFX and postproduction revenues include those earned from domestic and export services by companies in India.
 - Television subscription declined by 7 per cent in 2020-21, driven by the continued growth of free television, reverse migration and a reduction in Average Revenue Per User (ARPU) due to part implementation of NTO 2.0 (New Tariff Order). The NTO provides freedom to stakeholders to price their services while ensuring freedom to the customers to choose their channels.
 - Radio revenues declined due to overall slowdown and lower central government advertisement. Both advertisement rate and volume dropped as key advertiser segments (regional and retail) were unable to operate their businesses at their usual scale.

Gaming, artificial intelligence and virtual reality

- The online gaming industry sector which had a market size of INR 760 crores, saw a rise of 16.9 per cent in 2020-21 (the fastest growing segment of the Media and Entertainment sector for the fourth year in a row) driven by work from home, home-schooling and increased trial of online multi-player games during the lockdown. Online gaming includes video games, and captures only online gaming and no other form of gaming.
- Gaming and e-sport players are increasingly experimenting with cloud, Virtual Reality (VR) and Mixed Reality (MR). As of 2020-21, it is estimated that there are over 400 gaming start-ups in India and 5,527 (or 3 per cent of all) game publishers on Google Play are from India.

Literature and publishing

- The publishing industry which has a market size of INR 3,000 crores saw a decline of 40 per cent in 2020-21. The sector includes fiction, non-fiction and educational books in both online (e-books and audiobooks) and offline formats. India is considered to be the sixth-largest publisher in the world and the second-largest publisher of English-language books globally.
- In India, e-books have not gained the kind of anticipated market share as was expected. This hasn't stopped the industry from responding with enthusiasm in their own way with the entry of global players such as Storytel in 2017. While the penetration of these formats has been limited, analysts have pointed to positive trends during the pandemic that have changed reader behaviour. With closure of bookstores and challenges in distribution of physical books, the pandemic accelerated the adoption of digital formats for reading, and e-book and audio book sales increased significantly during the pandemic, as noted by the Bound India report. However, much of this data responds to English-language readership trends.
- By contrast, there has been marginal growth in digital adoption in the India language segment with relatively healthier trends in audiobook consumption. The Nielsen Book India report tracing the impact of Covid-19 on the 'India Book Consumer' stated that there's a 50 per cent uptake in the e-book and audiobook consumption, with women readers leading the way.
- A slew of digital conferences, fairs and initiatives have led to meeting many more publishers, authors and expanding networks the world-over than would have been otherwise



“I just think these new technology platforms of entertainment or technologies of pop culture have hugely contributed to the popularity of translation as a genre and as a social experience. Over time, you will find that a lot of minor languages become popular.”

Educator



“My translations have reached more people through social media.”

Translator



“I think if the pandemic has one silver lining, it is this transformation, the forced migration into digital for all kinds of content and with great benefit for the ecology and the environment.”

Cultural organisation

possible. How this interaction has translated to actual sales and business is yet to be seen. Social media has been another frontier for creative sectors that Covid-19 has helped forge a path towards. While several creative sectors reported using this time to shore up their social media engagement and community building, some have also reported increased sales.

Technology start-ups centered around e-publishing, are particularly catering to Indian languages. e-reading apps such as Pratilipi, e-Shabda jostle with Audible, Google Play Books and Storytel with their widening base of Indian language literature on these apps. Piracy concerns acts as a deterrent for smaller publishers who may have the rights to several translated works to seek digitalisation of their books but not the wherewithal to fight lengthy legal battles.

The publishing industry was badly hit as the entire value chain had zero sales for almost three months in 2020. Textbook publishing in India was impacted with sales of many well-known publishers dropping to as much as 50 per cent in comparison to 2019-20. The power of digital transformation was also felt, and the industry started getting understanding of the future of book reading formats, retail, genres and frequency. However, physical books still constitute 85-90 per cent of the total sales.

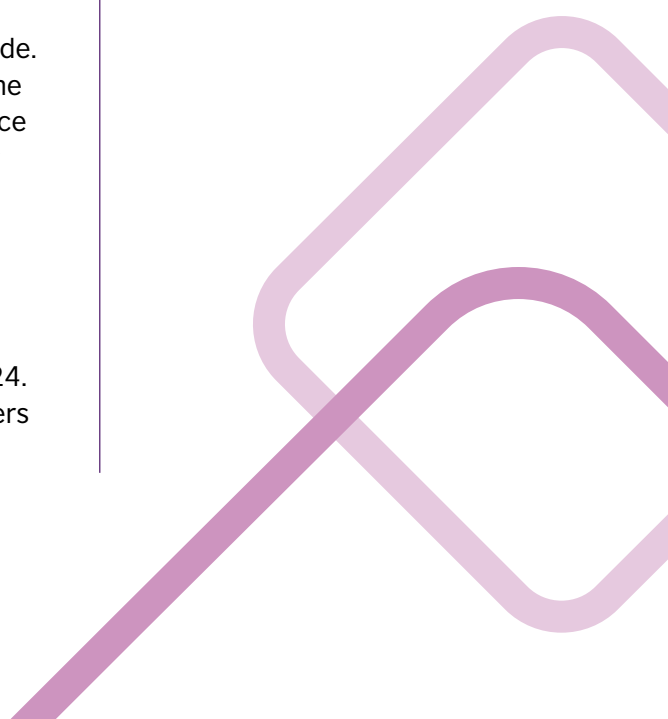
Crafts economy

- KPMG study for the National Skill Development Corporation (NSDC) (2013-17, 2017-22) had estimated that approximately 7.3 million people depend on handicraft and allied activities for livelihood. The handicraft and handloom sector in India is a INR 24,300-crore industry and contributes nearly INR 10,000 crores annually in export earnings.
- In the last financial year, the handicraft sector earned INR 367,898 crore through exports and INR 12,678 crores in the domestic market, handloom sector earned INR 2,280.18 crores in exports and INR 275,000 crores in domestic trade. The 12th Five Year Plan had projected it would become the largest non-farm sector in rural India, swelling its workforce by 10 per cent, doubling the output and exporting 18 per cent more during 2012-17.
- The handloom market which was at INR 1,050 crores witnessed a 43.1 per cent decline in 2020-21.
- In August 2021, the Minister of Textile, Mr. Piyush Goyal announced the increase of production and export by 2024. The plan is to connect weavers, trainers, equipment makers



“Our sales have plummeted 50 per cent this academic session”

– Ashwani Goyal, Managing Director, Goyal Publishers - one of the country's largest publishers of language learning books



from the Fashion Design Council of India (FDCI) with marketing experts and other stakeholders to formulate a strategy to promote the growth of the sector and developing new ways to ensure artisans and weavers have effective market access.

- To enhance the sales of Indian handicrafts and other goods, the business community of India, Confederation of All India Traders (CAIT) initiated a 'Bhartiya Saamaan-Hamara Abhiman' programme to ensure that local people across the country buy Indian goods in large numbers rather than imported products.
- The fashion industry adopted digitisation of sales and marketing with the crafts sector and the artisans, who make for the backbone of India's coveted textiles and fashion repository, left behind.

Summary

- Heritage sites and festival sector witnessed a decline of 76 per cent and 70 per cent respectively.
- The performing arts sector (the only organised sector) declined by 67.5 per cent in 2020. Most of the revenue in this sub-sector is largely received during the October to March festive season in India.
- Live events were perhaps the hardest hit, despite numerous attempts to digitalise its offerings. Even though artists turned to online shows, they were not always paid for their performance.
- The design industry sector, which was at INR 1,880 crores, witnessed a decline of 17.5 per cent in 2020. It includes graphic designs, industrial design, animation designs, interior designs, fashion designs, UI/UX designs, new media/ animation, and architecture. This decline may be short term as many Indian design companies are actively collaborating with international design companies to expand their service portfolio within diverse design disciplines. International design companies are also setting up their infrastructure in India.
- The craft market (including carpets) witnessed an overall decline of 38.4 percent in 2020; out of which the craft sector alone saw a 50 per cent decline in 2020. This sector includes metalware, wood ware, hand-printed textiles and scarves, embroidered and crocheted goods, shawls, zari and zari goods, imitation jewellery, and



“Kalyan Jana employs over 200 families. Last year, I couldn't hire any of them. We could neither find raw materials nor places to sell the mats. We usually make ₹25 lakh a year. In 2020, we made less than half of that”

– Kalyan Jana, maker of hand-crafted mats, West Bengal

agarbattis (incense sticks) and attars (fragrant essential oils), and carpets and floor coverings.

- After agriculture, handicrafts are the largest source of income among the rural population and employs 35.22 lakh weavers and artisans. The peak season for handloom is from December to March, with increased tourism activity, fairs and exhibitions taking place in tandem with the festival season. With the lockdown, production of handicrafts stopped completely, and huge unsold inventories piled up. Sales which take place through exhibitions or orders came to a standstill. This largely informal industry did not have any corpus to reinvest or support the artisans.
- Wood ware contributes the largest share of 38.2 per cent in the handicraft market, followed by carpet and other floor coverings (20.5 per cent).



“I and my employees were at home for several months in 2020. We usually have an annual turnover of ₹2 crore. Last year, we hardly made ₹5 lakh.”

– Bojraj Ramkrishna, tussar silk weaver, Vidarbha

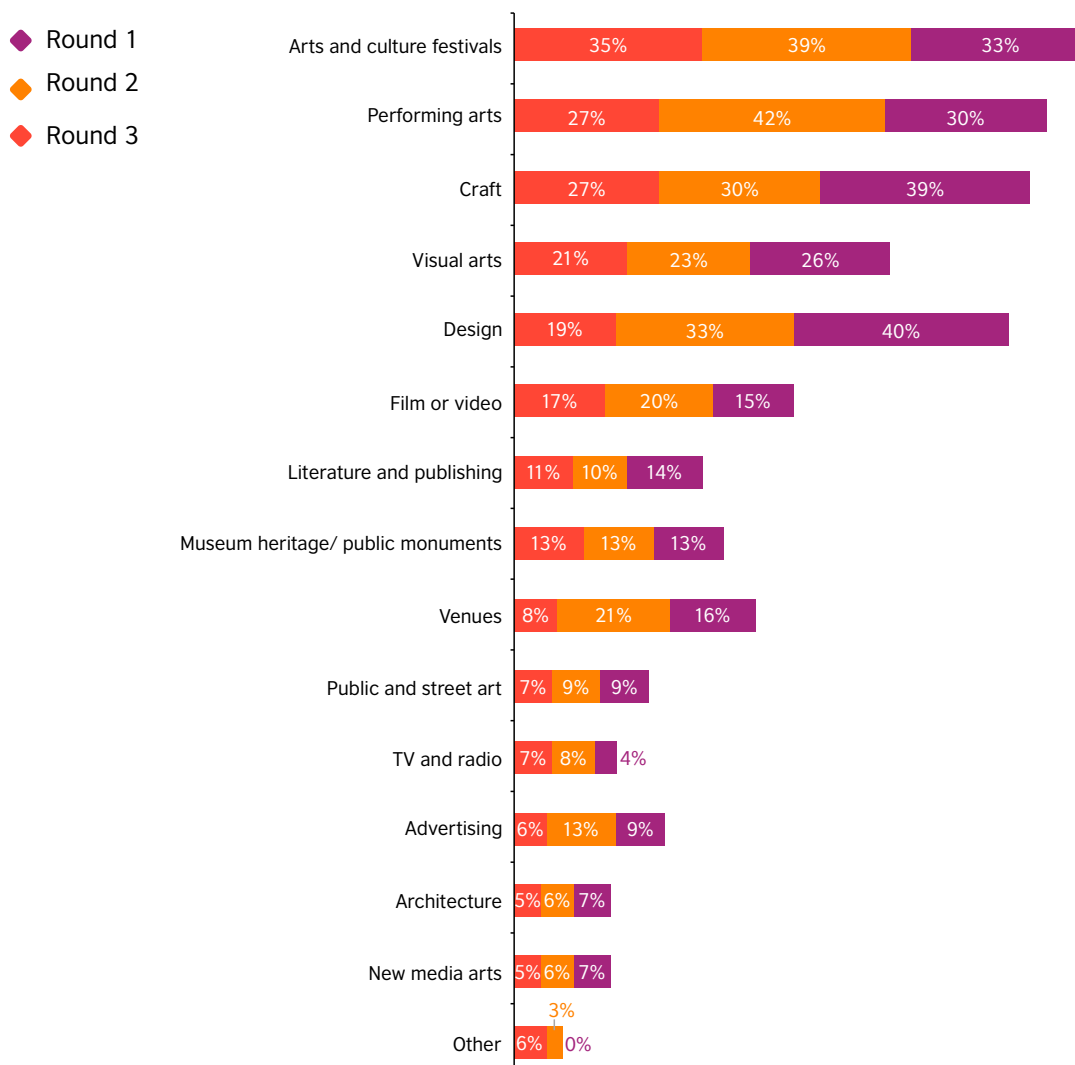


Survey 3: Primary research survey

Creative industries profile

310 responses were received in the first survey which was done at the onset of the pandemic and 432 responses were received during the second survey which was conducted when the lockdown had been lifted and the sector began reopening. A total of 298 responses were received in the final round during the dramatic impact of the second wave.

A range of arts and culture sectors and organisations participated in the survey. 33 per cent of the creative sectors identified themselves as belonging to the cultural festival sector, 30 per cent from performing arts, 27 per cent from crafts, 21 per cent from visual arts, 19 per cent from design, 17 per cent from film and video, 13 per cent from literature and publishing and 11 per cent from museums, galleries and public monuments. This data is not



n = Round 3(298), Round 2(432), Round 1(310)

to be read in absolute percentages as these categories are not strictly independent and overlap with many of the creative sectors working in multiple programme areas.

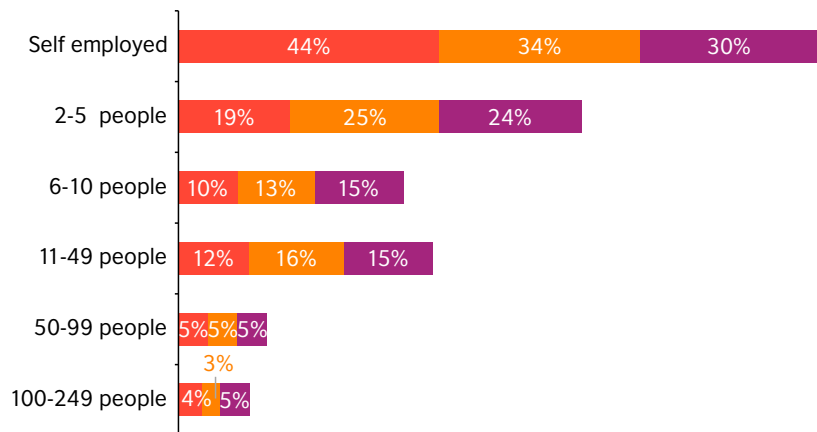
Decline in participation

- **Performing arts:** 30 per cent decline in survey 3 as compared to 42 per cent in survey 2 and 27 percent in survey 1.
- **Design:** 19 per cent decline in survey 3 from 33 per cent in survey 2 and 40 per cent in survey 1.

- **Crafts:** 27 per cent decline in survey 3 from 30 per cent in survey 2 and 39 per cent in survey 1.
- **Venues (museums, galleries, cinemas, theatres):** 8 per cent decline in survey 3 from 21 per cent in survey 2 and 16 per cent in survey 1.
- **Advertising:** 6 per cent in survey 3 from 13 per cent in survey 2 and 9 per cent in survey 1.

Micro, small, medium and large enterprises

- ◆ Round 1
- ◆ Round 2
- ◆ Round 3



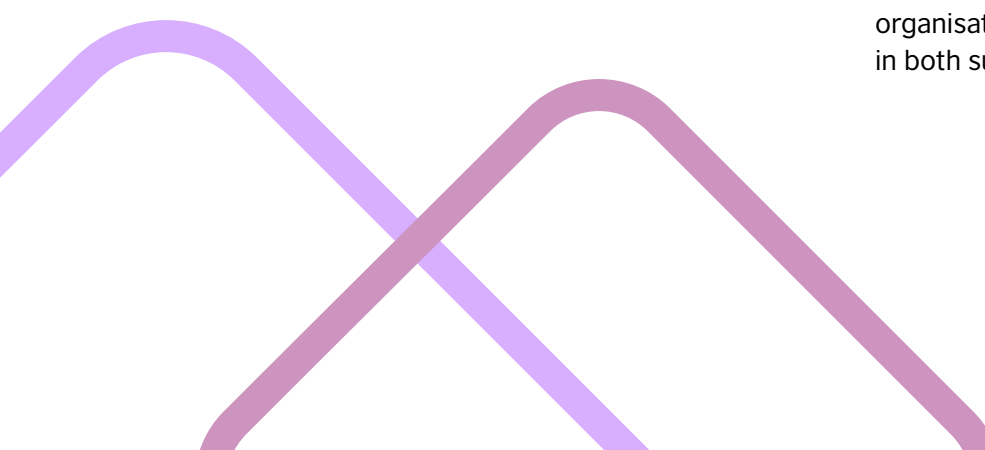
n = Round 3(298), Round 2(432), Round 1(310)

Increase in self-employed workforce:

- **44 per cent of the creative sectors workforce are now self-employed;** a significant increase of 14 per cent from survey 1 creative sectors and 10 per cent from survey 2 creative sectors.

Cuts to employment:

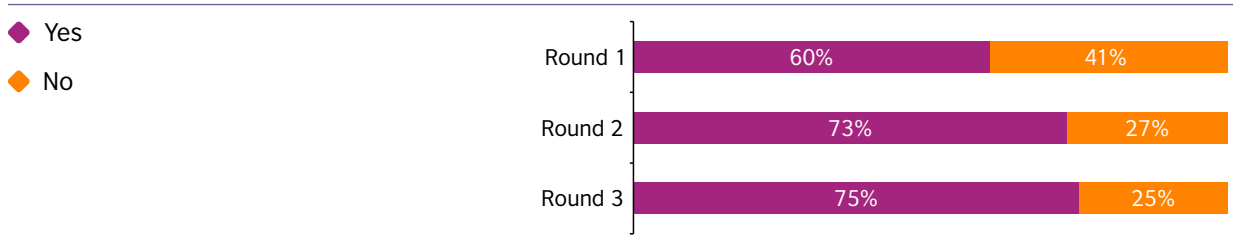
- **Cuts to micro-size enterprises:** 29 per cent creative sectors reported employing up to ten people in their organisations in survey 3 as compared to 38 per cent in survey 2 and 39 per cent in survey 1.
- **Cuts to small-scale enterprises:** 41 per cent have two to 49 people in their organisations as compared to 54 per cent in both survey 2 and survey 1.



Impact of Covid-19: Business currently operational

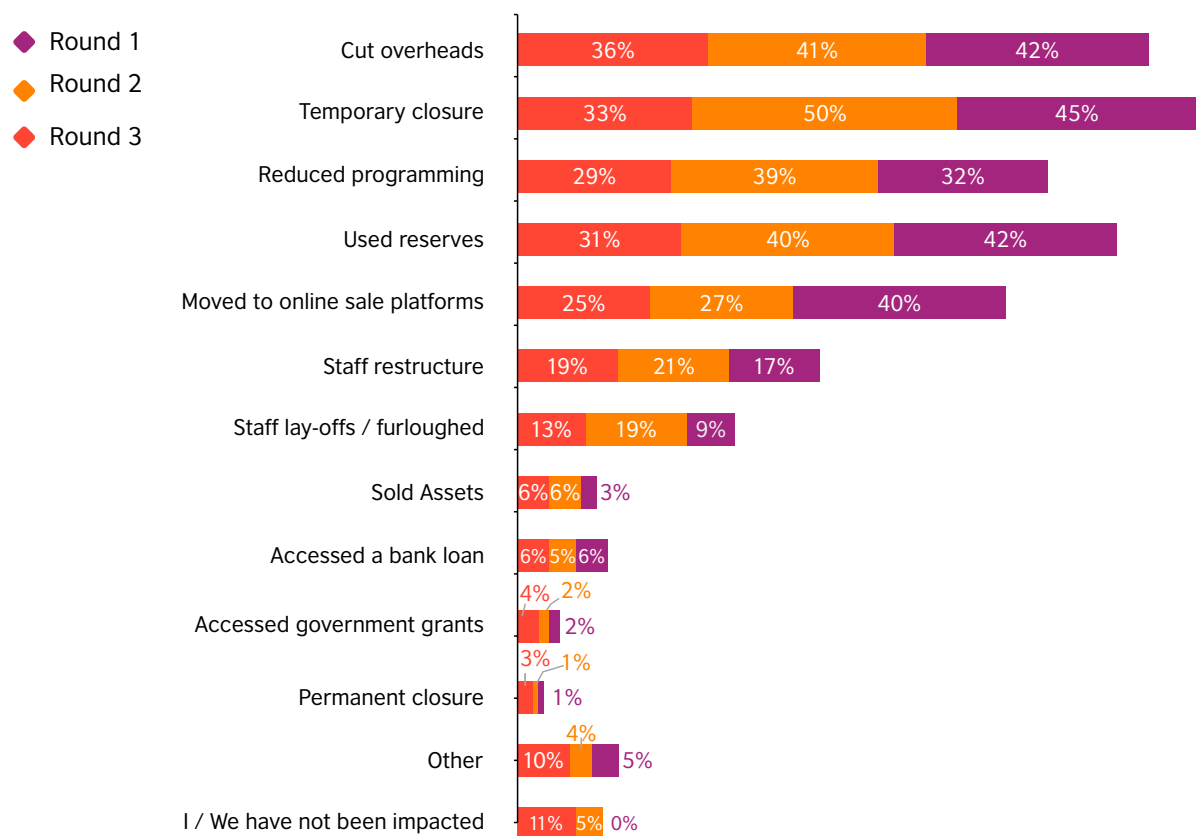
Modest 2 per cent increase to businesses operational again: Despite the dramatic impact of the second wave (April-June 2021), 75 per cent of

businesses were operational during the period of survey 3 as compared to 73 per cent in survey 2 and 60 per cent in survey 1.



n = Round 3(298), Round 2(432), Round 1(310)

Business recovery and impact on programming



n = Round 3(298), Round 2(432), Round 1(310)

17 per cent of businesses were operational as compared to survey 2 and 12 percent as compared to survey 1.

7 per cent returned to programming, 32 per cent of the respondents reduced programming compared to 29 per cent in survey 1 and 39 per cent in survey 2.

Majority of the repeat respondents (61%) have been able to keep their creative and artistic programme active in the financial year 2020-2021. Almost all of them (94%) are working in 'only digital' or 'digital+live' (hybrid) models. There is no significant change in the delivery model of these repeat respondents from survey 2 (94% working on 'only digital' or hybrid models in survey 3 vs. 87% in survey 2).

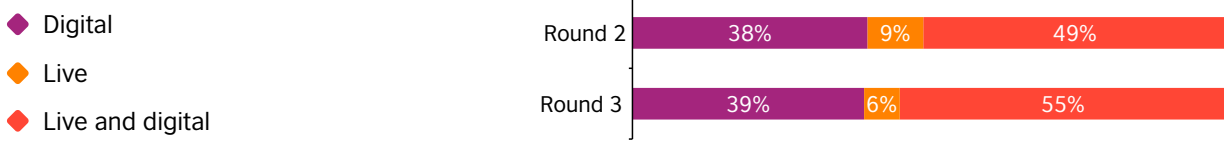
Cut to overheads: More than one third of the organisations reported cutting overheads in survey 1, this percentage increased by 5 percent in survey 2 and 6 percent in survey 3. Cuts to business overheads by:

- staff restructure 19 per cent in survey 3, 21 per cent in survey 2 and 17 per cent in survey 1
- staff layoffs 13 per cent in survey 3, 19 per cent in survey 2 and 9 per cent in survey 1
- reduced recourse to use of reserve funds; 31


per cent in survey 3, 40 per cent in round 2 and 42 per cent in survey.

Majority of the repeat respondents (61 per cent) have been able to keep their creative and artistic programme active in the financial year 2020-2021. Almost all of them (94 per cent) are working in 'only digital' or 'digital+live' (hybrid) models. There is no significant change in the delivery model of these repeat respondents from survey 2 (94 per cent working on 'only digital' or hybrid models in survey 3 vs. 87 per cent in survey 2).

Delivery Model for Programmes in FY 2020-2021



n = Round 3(31), Round 2(45) – repeat respondents with active creative/artistic programme in FY 2020-21

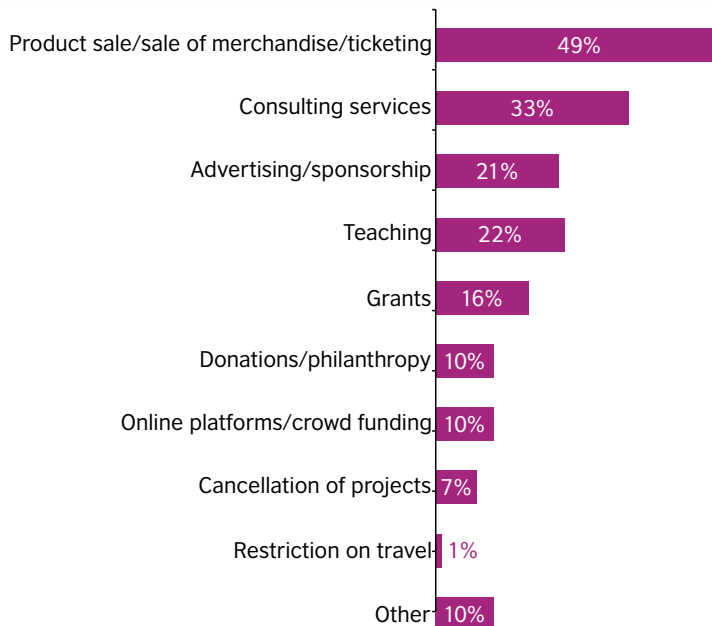


Ami Shroff
Not for profit organisation
Crafts, heritage and public monuments

Because of COVID-19, she had to cut overheads, and move to online sale platforms

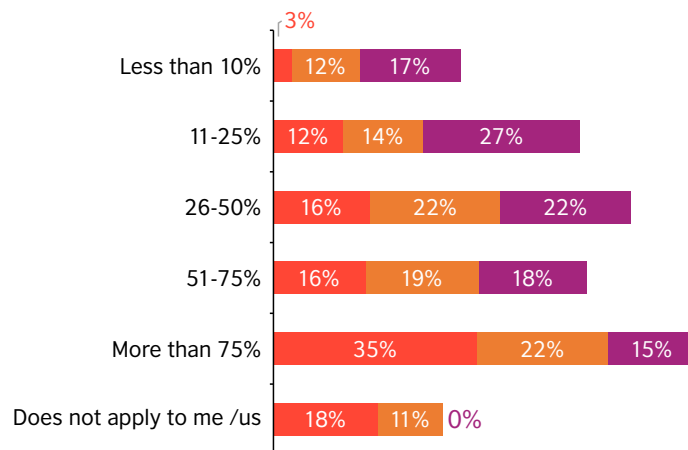
“We have a shop in Mumbai which we had to shut down because the expenses were not affordable. During the lockdown we tried to shift (as much as we could) to online platforms which are for direct customers like Ikigai, Okhai. We are also coming up with our own website but got delayed because of payment portal.”

Losses to revenue



Loss in Annual Revenue

- ◆ Round 1
- ◆ Round 2
- ◆ Round 3



Increased losses in annual revenue: Creative sectors reported 51 per cent or more loss in annual revenue in 2020-21 in survey 3. This was significantly higher than the previous surveys (41 per cent in survey 2 and 33 per cent in survey 1 respectively).

One in two creative sectors in survey 3 has experienced 50 per cent or more loss in annual revenue in 2020-21. This is significantly higher than the previous 2 surveys (41 per cent and 33 per cent in round 2 and 1 respectively).

Losses in income is mainly reported from sale of products, merchandise and ticketing (49 per cent) in survey 3. This is a shift from the previous rounds where the loss in revenue was mostly from commissions and professional fees (45 per cent and 44 per cent in round 2 and 1), artist fees (48

per cent and 21 per cent) and businesses as a vendor or service provider (35 per cent and 44 per cent).

A significant minority (11 per cent in survey 2 and 18 per cent in survey 3) have reported the pandemic has not impacted their income. This question was not asked in survey 1.

Market sizing analysis shows, the patchwork of lockdowns and waves of Covid-19 across the country resulted huge revenue losses between May 2020 to July 2021.

Live events were the hardest hit of all the sectors. There was very limited government or state monetary support for artists. In many cases they received zero income from digital performances.

*Businesses as a vendor or service provider was substituted in survey 3 with product sale or merchandising sale.



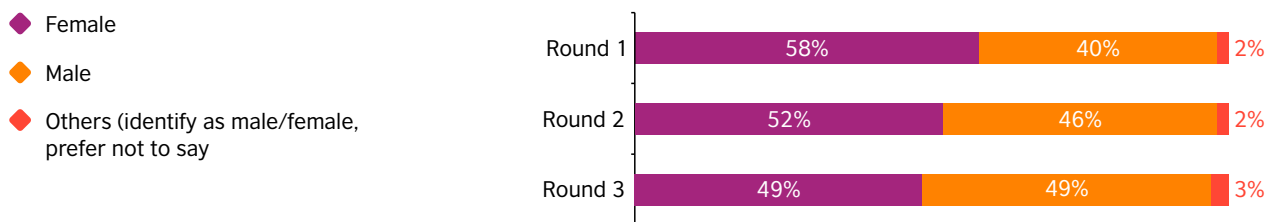
Jugal Mody

Freelancer
Literature and
publishing

Because of Covid-19, he had to use his reserve funds and would also require funding to secure the future of his artistic work

“Artists are bad at money management, which becomes worse during an apocalypse. So providing services like accounting and investment managers will make life so much better. Of course, no body needs to do it for free”

Creative industries demographics



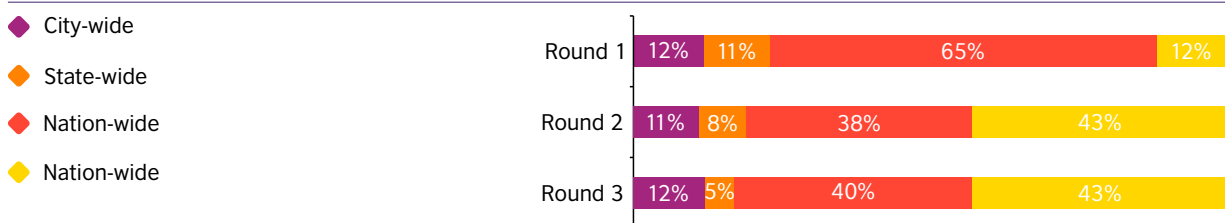
n = Round 3(298), Round 2(432), Round 1(310)

A fairly equal number of men and women work in the creative industries. However, a majority 59 per cent women work in the crafts sector. Covid-19 has

had a serious and deepening impact on gender divisions.

Creative industry analysis: Scale of activity and size of organisations

Scale of Activity



n = Round 3(298), Round 2(432), Round 1(310)

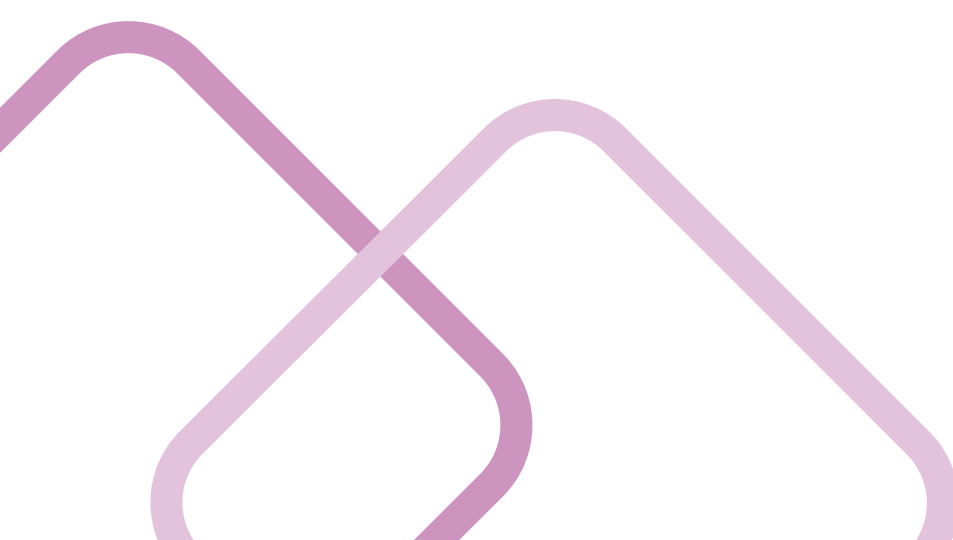
40 per cent of the creative industries have a national level presence and 43 per cent have an international presence. The remaining 17 have state-wide or city-wide presence. This shows a significant shift in international presence from the first two reports where 12 per cent had an international presence.

This reflects a move to digital platforms to reach audiences and markets. However, this has not been reflected in increased sales, simply audience reach.

63 per cent of creative companies have been established for 10+ years. This is an increase of 10 per cent from survey 1.

This reflects relative reduction in the number of younger arts enterprises who shut down permanently in the same period.

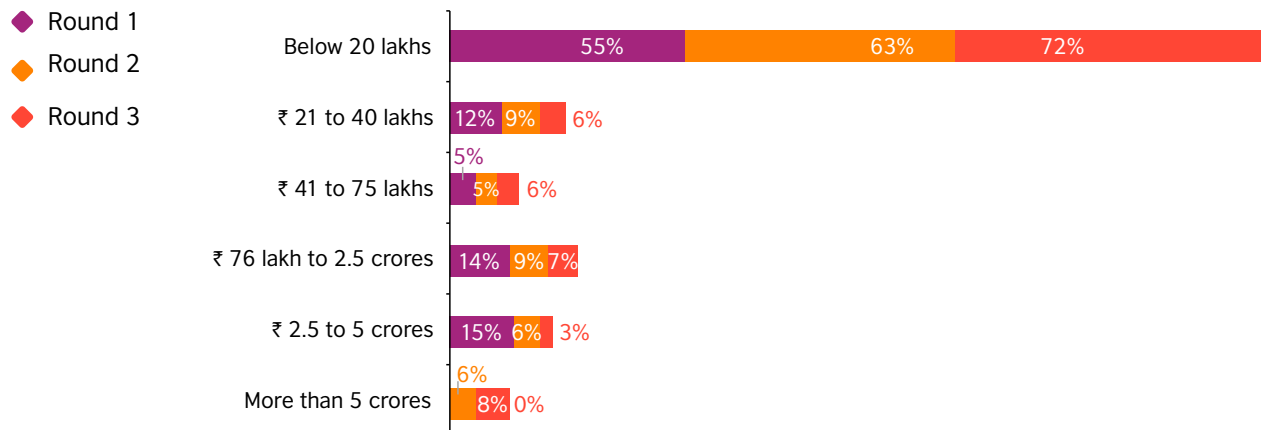
Arts enterprises 0-3 years has declined rapidly by 7 per cent from 11 per cent in survey 3, 16 per cent in survey 2 and 18 per cent in survey 1.



Creative industries business models

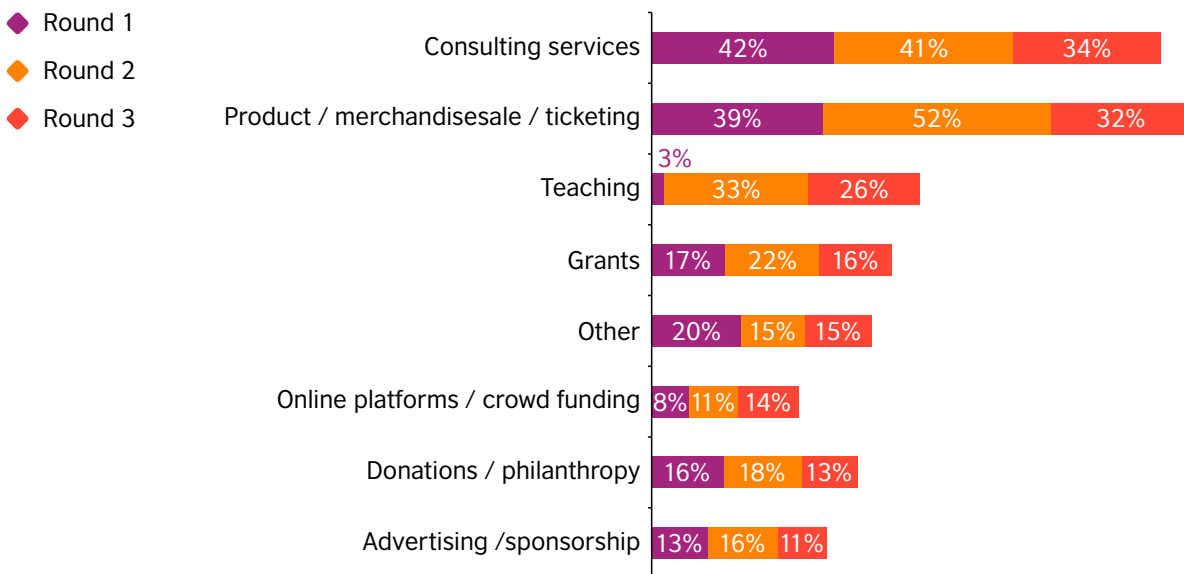
Turnover and sources of income

Annual Turnover



n = Round 3(285), Round 2(432), Round 1(310)

Current Sources of Income



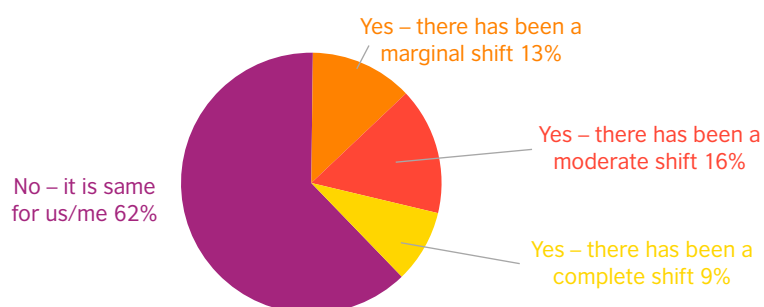
n = Round 3(285), Round 2(432), Round 1(310)

- **Increase in income (under 20 lakhs):** 72 per cent survey 3, 63 per cent survey 2 and 55 per cent survey 1.
- **Decrease in income (2.5 to 5 crores):** 3 per cent survey 3, 6 per cent survey 2 and 15 per cent survey 1
- **Decrease in income (21 to 40 lakhs):** 6 per cent survey 3, 9 per cent survey 2 and 12 per cent survey 1.

Trends across creative industries:

- Consulting services for the first time showed a dip of 8 percent in survey 3 compared to survey 1.
- Merchandise and ticketing sales dipped by 20 per cent in survey 3 compared to survey 2.
- Recourse to Teaching increased by 30 per cent survey 2 but reduced by 7 per cent in survey 3.
- Online income grew modestly by 6 percent from 8 percent in survey 1 to 14 percent in survey 3.

Change in source of income



| | No Change in Primary Income Source | Moderate/ Complete shift in Primary Income Source |
|---|------------------------------------|---|
| Company Size | | |
| MICRO - self-employed/ 2-5 employees | 69% | 60% |
| SMALL TO MID 6-99 employees | 21% | 33% |
| LARGE 100+ employees | 10% | 8% |
| Sub-sectors | | |
| Arts and cultural festivals | 27% | 43% |
| Literature and publishing | 10% | 20% |
| Design | 18% | 24% |
| Crafts | 26% | 20% |
| Annual Revenue (Fy 2020 - 2021) | | |
| Below 20 lakhs | 79% | 64% |
| 20 lakhs or more | 21% | 36% |

n = Round 3(298)



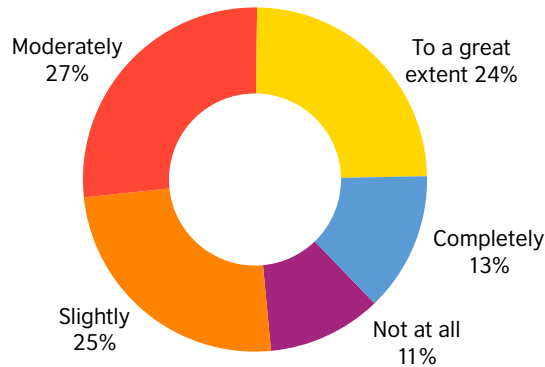
Madhu Shrivastava
Freelancer Anchor and Filmmaker

Adapted her business model/services to a great extent but with no change in primary income sources

“Since last year, everything has been digital. I started a new online series called 'Kala-kahani', available on Facebook and Youtube, where I used to interview young musicians and dancers. It was a collaborative effort with the purpose of keeping ourselves busy. No income was involved in this.”

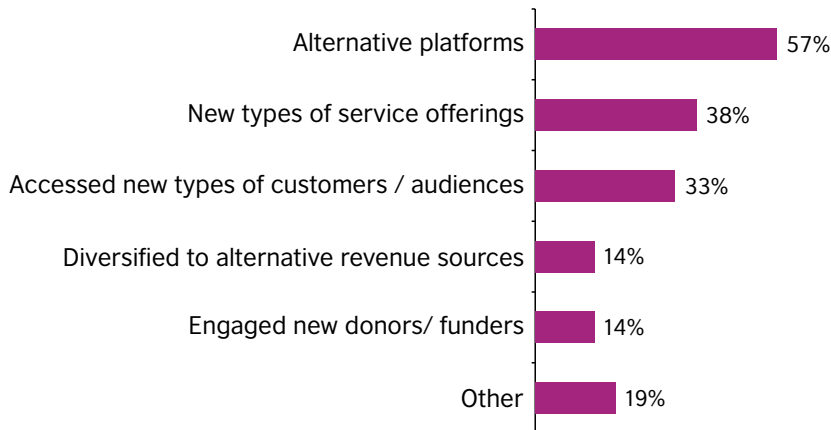
Transformation of business models

Adapted Business Model due to Covid-19



n = Round 3(298)

Changes made to the Business Model



n = Round 3(42) – Those who have adapted their business model

89 per cent of creative sectors reported to have changed business models because of Covid-19.

57 per cent of creative sectors have moved to digital platforms

38 percent have added new services and products

33 per cent developed new on and offline markets

Organisations who reported moderate (16 per cent) or complete (9 per cent) change in primary income sources, are mostly micro and small sized organisations with 6 - 99 employees.

43 per cent of these organisations represent arts and cultural festivals,

24 per cent represent design

20 per cent literature and publishing

This reflects the adaptability of some arts entrepreneurship of MSMEs.

21 per cent of the organisations reported there was no change in primary income sources.

This reflects the adaptability of some arts entrepreneurship of MSMEs.

21 percent of the organisations reported there was no change primary income sources



Aaron Fernandes
Small business owner
Arts and cultural
festivals

**Adapted his
business
model/services to
a great extent and
with moderate
shift in primary
income sources**

“Some of my international tours planned for later half of 2020 got cancelled, and that was the time when some art organisations approached me to see if I can help. By then (May-June 2020) I realized that international work will take time to pick up and hence I started focusing on consulting these organisations within India.”



Case studies

An independent arts festival



Ziro Focus 2021

The India-Wales Virtual Music Festival, 'Ziro Focus 2020', was an international collaborative project produced by Ziro Festival of Music, India in partnership with Focus Wales, UK, supported by the British Council. It featured showcases from three Welsh and three Indian artists in a customised virtual world created to represent each festival i.e. Ziro and Wrexham. Apart from these, there were four record labels and many more artists who were directly participating in the festival.

Adapting the business

'In the past two years, we have had to change plans several times and although it was challenging, it was also a period of learning and new opportunities. It took us down unexplored avenues that led to new successes and growth. The work we have presented, and continue to do would not have been possible without the people I have the privilege of working with.' Lubna Shaheen, Program Director and Founding Member, Ziro Music Festival

Moving to a digital platform

“Due to the pandemic, we altered our Year 1 Research & Development plans to redirect funds towards creating a public facing project that incorporated some elements from Year 2's plan. The platform used to deliver Ziro Focus 2020 was specifically built for a digital experience with integrated networking facilities. These elements allowed both artists and



attendees to experience something unique and has set a new standard for virtual music festivals, as noted by the media.”

New artist and audience networks

It created a space for introducing artists and their work to each other; conversations between arts professionals; meeting people from diverse cultures; and audiences discovering new Welsh and Indian music. Ziro Focus 2020 engaged with artists, arts professionals, and audiences not only from India and Wales, but from across the world including the UK, USA, Australia, Europe, Iran and Sri Lanka.

- 60 artists
- Four record labels
- 516 audiences
- 50 per cent - female, 49 per cent - male, 1 percent - preferred not to say
- Audience from ten countries



A government arts festival

Kalinga Literary Festival

(KLF) emerged in 2014 out of the common vision shared by a group of youths. The year 2014 is important as this was the year that Odia became the sixth classical language in India, joining the coveted group of languages including Sanskrit, Malayalam, Kannada, Tamil and Telugu.

Move to a digital platform

It was during the lockdown, the Kalinga Literary Festival

announced its virtual platform 'KLF Bhava Samvad' on 17 May 2020. A year down the line, KLF Bhava Samvad has now successfully hosted 200 plus sessions with 500 speakers and over 15 million audience engagement. KLF Bhava Samvad's sessions focus on literature, public policy, thinking in multiculturalism, humanism and contemporary issues of society at large. It has also hosted the first ever virtual tribal literature festival called the 'Kandhamal Literary Festival - Virtual'. Despite major glitches in funding, this festival grew and expanded its reach.

The sessions have been attended by a long list of eminent personalities from literature, business, and culture. The festival has grown to be known as a vibrant platform for regional languages, young minds, and seasonal scholars.

According to Mr. Rashmi Ranjan Parida, Founder-director, Odishadiary Foundation, Kalinga Literary Festival, and Mystic Kalinga Festival, "Compact and classy, that is the model of KLF Bhava Samvad. With over 200 sessions, we have come a long way. It is people's love for literature that made this happen.

Changes to the festival's artistic focus

We have created a space for regional literature and gone beyond the dominance of Hindi and English. Our recently concluded eighth edition of KLF in 2021 created history by hosting a contingent of talented poets and writers from across India and the world over. Writers from Nepal, and the UK joined the programme. Writers and poets from Jammu and Kashmir also participated in the KLF and recited their poems in Kashmiri, Urdu, Dogri and Hindi.

KLF also started literary festivals in Maithili and Gujrati languages. We developed a special relationship with the British Council and the Nepal Government to take the literary discussion beyond the boundary of India and include a South Asian and Global Consciousness.



A Creative Industries NGO



Khamir

Khamir is a craft organisation based in the Kutch district of Gujarat. We have been working with local craft persons since our inception in 2005. The Covid-19 pandemic started in the district in March, with the first case being reported on 19 March 2020. As an organisation, we had to take on double the responsibility. Not only did we have to take care of our own staff and operations, but also the community members with whom we have been working since our inception.

The impact of lockdown

We started our response to the Covid-19 pandemic as early as the middle of March 2020. We closed down our guest house and campus for visitors on 15 March 2020 and the entire Khamir campus was closed on 21 March 2020, a day before the onset of the Janta Curfew (a national lockdown) imposed by the government. By this time, the impacts of this pandemic became visible in Kachchh, as many of the organised tours were cancelled. Many buyers also started putting their production on hold as the lockdown was announced. There was a deep sense of uncertainty gripping the artisans with whom we were working. Although we ensured that we provided enough raw materials, carded wool and cotton to hand spinners as well as yarn to weavers for a month, the situation was very tense at their end as all the movement had been put on hold.

Emergency financial relief for basic needs

We started calling artisans and weavers to assess their situation and exchange a few words of comfort and sympathy. The situation was under control for about a month before the artisans started having issues with the raw materials as well as the cash in hand. We took a decision to provide them with INR 5,000 to 10,000 that we would deposit into their bank accounts so that



they could take care of their basic consumption needs during lockdown. As the relaxation in lockdown was announced, the first request from the weavers was for yarn. Khamir started coordinating ration kits for the vulnerable artisans and weavers. We also developed masks to be distributed, free of cost, among the communities we worked with. However, the weavers were desperately asking for the yarn as they did not have the raw material with which to weave, so they were gripped with a sense of loss of livelihood. Once the relaxation in transportation was announced, we started working towards solving this problem too.

Keeping artists and artisans safe

The safety of staff going to every village was paramount, so we did not want to take a chance with them too. After much discussion and deliberation, we decided to prepare yarn kits with whatever yarn was available to us. We put together the yarn of 1.5 months into a cloth bag and then covered it with a polythene bag. We also put cloth masks (two masks per family) along with each kit. We told our staff to take all the yarn kits in one vehicle and place them at the doorsteps of the weavers and then talk to them from a certain distance. We also instructed the weavers to remove the outer polythene cover upon receiving the yarn kit and dispose of it to avoid risk of any infection. Using polythene for such purposes is usually against the organisation's norms, but in this instance, we had to prioritise health and safety over environment.

Changes to the supply chain

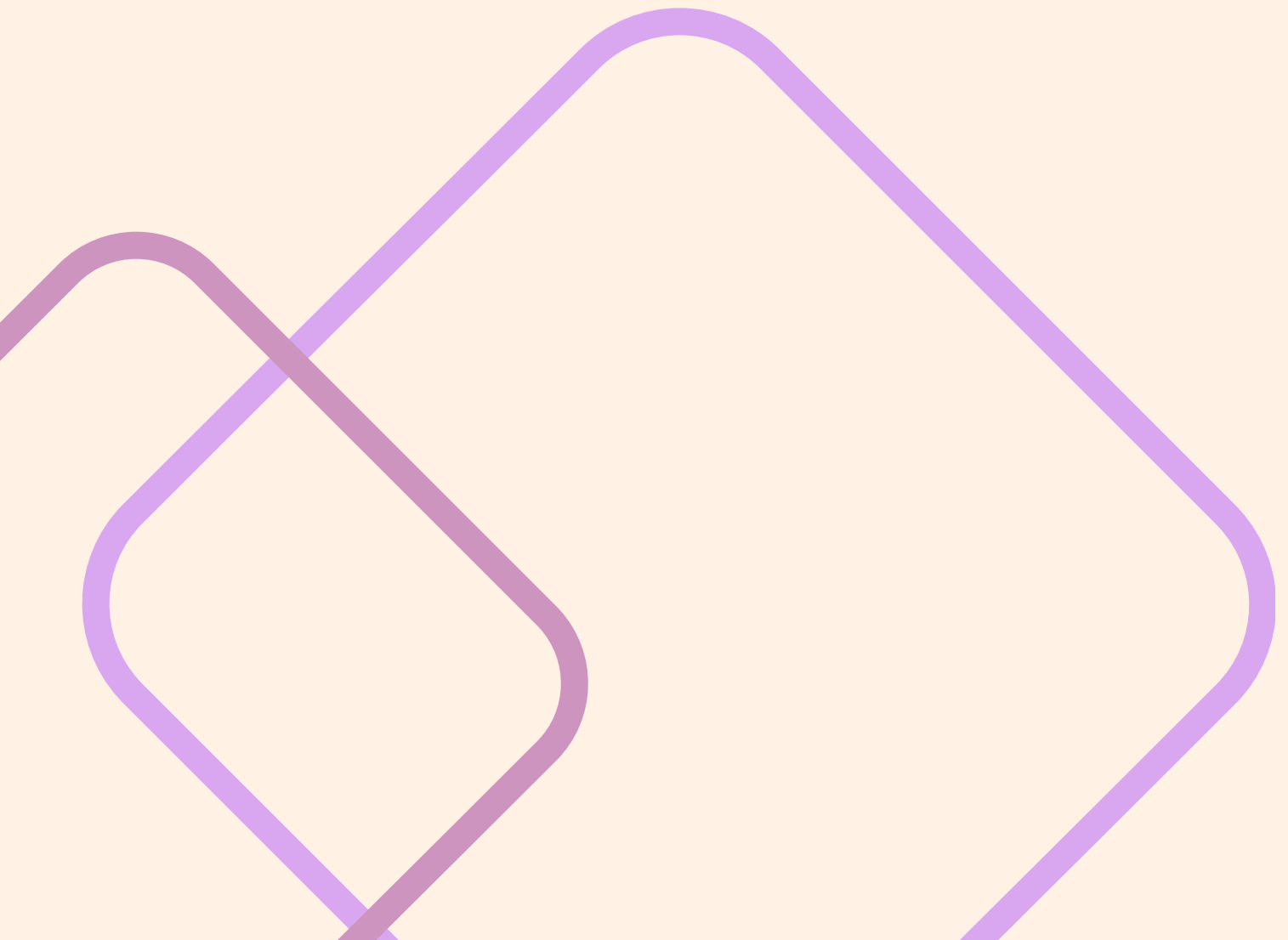
The young team members joined the process to make and distribute the yarn kits in just within

seven days. More than 75 weavers based in 15 villages were covered. We told them to make whatever they could out of that quantity of yarn provided. Similar kits were developed and distributed among the hand spinners too.

Once the lockdown restrictions eased, many native Kutchis started coming here from cities and local people started going out. The number of cases in villages also increased. There were few cases in weaver villages at that time. As one month passed, it was time to collect the fabric from the weaver villages. The young team members Sanjay, Mayur, Suresh, Lay etc once more took similar risks when they went out again to start collecting the fabric.

Major disruptions to the business and livelihoods

In this process, Khamir faced many order cancellations and there were no secure markets. To sustain the weavers and hand spinners, we assured them work worth a minimum INR 10,000 per month, so that they don't worry about the absence of work or shifting to other livelihoods. The weavers were also happy to reduce the wages by 10 to 15 per cent so that more work could be given, and we could reduce the overall price of fabric and offset the transportation cost. We continued with yarn kits during the next three to four months. We didn't stop any work of any artisan weaver working with us during the first and second wave of Covid-19, despite piling up the stocks. Although we didn't know it at the time, the piled-up stock later helped us to approach emerging online markets as well as create a range of Kala cotton garments for the local markets.



An independent artist

Adiwashi Warli Artist : Anil Chaitya Vangad, Maharashtra, Palghar District

I am a fourth generation Warli painter. Warli painting is a form of tribal art mostly created by the tribal people from the North Sahyadri Range in Maharashtra, India. The paintings depict social life. Pictures of human beings and animals, along with scenes from daily life, are created in a loose rhythmic pattern.

I am working for 20 years and have done exhibitions in various countries such as the USA, France, Singapore, Hong Kong, UK, Germany, Australia and Canada. However, the past two years was a very difficult time for everyone and has been of great difficulty for me. The situation in our village totally changed as soon as the lockdowns happened. A lot of people lost their livelihood and had to come back to the village.

Loss of livelihood

I felt shattered. I lost my livelihood during this period. I did not have access to art materials as courier services took a hit as well. There was no way to sell any of the paintings. I did not know what to do with my family of five including my three daughters who were suddenly sent back from their hostel. All the shops in the villages were closed and everything was sold at twice the price. We had to think twice before buying medicines. Me and my wife were very worried.

However, I learnt a lot from the cockdowns. I started to make paintings on the theme of Covid-19 with the little material I had left with me. The first painting was on the situation I was experiencing in my village, the second was on how Covid-19 had spread to different countries and the third was on how to break the chain of infection.

Adaptation to digital platforms to sustain

I then put up these paintings on different social media channels and people started responding to me. It is this initiative of mine that helped me to stand up on my feet and protect my family's Warli painting heritage. Soon, I had students who enrolled for my online classes with an average of 12 students per class. Students from the USA, France and Jaipur also participated in these classes.

After the news of my work was published in local papers, the Block Level Government officers contacted me and requested me to do some wall paintings. I, along with my team, completed that assignment. Some NGOs also helped me and encouraged me and my students by giving us food kits and financial aid.

Today I have again been able to submit my paintings at different art camps. This way, I was able to carry on with the tradition of upholding our family's art.



Arts and culture: literature review



This summary provides insight into the prevailing context, sector insights, international government responses, India's variable national and state governments responses, policies and schemes. Along with the research report, which is based on analysis of data, the literature discussed below provided information on the way the sector has responded. The data has been sourced from various research reports, publications by various agencies and consultancies working in the field and accredited media reports.

A. Impact of the pandemic on the creative sector Covid-19

- The world of music, dance, songs, poems and performances that fill up our senses and bring in the rhythm to our lives disappeared in a moment and left us grappling with the confusion that followed the onset of the pandemic. The creative sector since then has experienced tremendous uncertainty.
- The arts and heritage sectors are the essential DNA of India's cultural relations. A vibrant entertainment sector and diverse cultural traditions form a strong backbone of creative capital. Lack of detailed data for the services sector as well as the informal sector remains the biggest barrier in accurate evaluations of the true value of India's creative economy².
- According to UNESCO, in 2013 Cultural and Creative Industries (CCI) worldwide generated revenues of \$2,250 billion and employed 29 million people, within which

the Performing Arts sector alone contributed \$127 billion and employed 3.5 million people². As per a survey carried out by the National Sample Survey Organisation (NSSO) in 2009–10, the total employment in the country was 46.5 crore comprising around 2.8 crore in the organised and the remaining 43.7 crore workers in the unorganised sector. A large section of this unorganised labour force includes crafts artisans, handicraft artisans, handloom weavers and other artisans. The impact of Covid-19 in India has been substantial across artforms and sectors and has been particularly felt in venue and site-based activities such as theatre, live music, festivals, cinemas and museums.

B. Sector insight

The creative sector went through uncertain and extremely difficult times during the pandemic. And yet there have been innovations along with wide exploration of the digital avenue. The art churned out in these times has been innovative, inspiring and the significance of this outpouring will only be realised over time.

The handloom and handicraft sector in India is the second-largest employment provider after agriculture. It is claimed that an aggregate of 200 million people is associated with this sector. The volume of the industry stands at around INR 15,000-25,000 crores. The handicrafts sector experienced cash flow issues, cancellation and withholding of orders along with wage loss, supply disruptions and uncertainty regarding shipments.³ However,

2. Measuring India's Creative Economy" www.esyacentre.org/ <https://www.livemint.com/opinion/online-views/just-how-big-is-india-s-creative-economy-11593446149540.html>

3. <https://www.sdabocconi.it/en/news/20/12/the-impact-of-Covid-19-Covid-19-Covid-19-19-19-on-the-future-of-performing-arts-a-survey-of-top-industry-executives-in-europe-and-the-us>

4. Pandemic delivered a more severe blow to smaller, individual artisans: AIACA - The Statesman." <https://www.thestatesman.com/features/pandemic-delivered-severe-blow-smaller-individual-artisans-aiaca-1502953342.html>



entrepreneurial spirit of SHGs, artisans, and weavers was not deterred, and they responded to the changing needs by training themselves in products defining the new normal and made essentials like face masks, sanitisers, and other medical necessities.

The pandemic tipped the world of performing arts on its axis. Art and artistes almost immediately fell into the 'non-essential category', and several artistes saw their livelihoods wiped out in just a few hours. In 2020, estimates⁵ say the cancellation of public performances alone has cost authors roughly 30 per cent of global royalties, while the global film industry has lost \$7 billion in revenues. Here too groups began organising online concerts along with innovations which included developing a more contemporary approach to teaching extremely traditional art forms.

India's museums and art galleries experienced prolonged closures of the physical exhibiting spaces as that appeared to be the only option. The extended closures and the sharp drop in attendance and revenue impacted the museum sector as a whole, making it more difficult to sustain efforts to conserve collections, ensure

their security, and nurture relations with the public and local communities and yet, there has been adaptability. Digital formats such as the online viewing rooms and virtual exhibitions, which were largely alien to the market here, have become part of a new way of engaging with the audience and doing business.

UNESCO has published a report⁶ providing a provisional assessment of the situation of 104,000 museums in the face of Covid-19, based on data provided by 87 member states in an online survey conducted last March. The authors of the report point to the essential economic and social functions of museums, and to their potential contribution to post-Covid-19 recovery. Recommendations include implementation of a large-scale digitisation policy to inventory collections, and measures to support education, training and research.

On the other side of the spectrum, India's gaming sector has witnessed huge growth, leading to the speculation that India might become the next major online gaming market. Covid-19 has driven the consumers to online gaming platforms in light of the scarcity of entertainment choices during lockdown. 45 per cent of the Indian population is said to be playing games on their cell phones as a result of the pandemic⁷.

The creative sector is now positioned at a turning point. There is the need for the artists to be able to take care of their own wellbeing and for the sector to grow and thrive. Digitalisation coupled with emerging technologies, such as virtual and augmented realities, can create new forms of cultural experience, and new business models with market potential. The provision of digitally mediated cultural content has opened the door to many future innovations. At the same time, the power of physically engaging with art and the changes in experiences from the moment of engagement and over time is its most abiding element. The coming days will reveal how art is recreated in physical spaces along with its evolution in the digital space.

5. https://en.unesco.org/sites/default/files/debate_guide_en.pdf

6. <https://en.unesco.org/news/supporting-museums-unesco-report-points-options-future>

7. <https://www.mid-day.com/lifestyle/infotainment/article/indian-online-gaming-industry-is-it-the-next-big-thing-23190660>

Sector snapshots:

1. Building long-term resilience and sustainability of the crafts sector:

Key insights from the report, 'Re-imagining the craft economy post-Covid 19'

- The pandemic and lockdowns forced the most vulnerable artisans to choose between safeguarding lives or livelihoods. It triggered a mass exodus of artisans from cities to the villages, and 22 per cent of the sector lost 75 per cent of their annual income.
- 44 per cent faced cancellation of orders by the buyers and delay in payments, only 58 per cent made new products during the pandemic, and 76 per cent shared that their work was negatively impacted by the pandemic.
- Access to working capital and credit is largely through informal channels and money lenders at exorbitant interest rates. During the pandemic, 2 per cent of the sector had accessed bank loans and 1 per cent had accessed government grants.
- The uncertainty during the pandemic brought fragmented stakeholders together for collective action. This fostered innovation, skills exchange, skills development and collaboration amongst stakeholders that usually work in silos.
- Craft organisations adapted to new realities and pivoted to digital platforms, introduced new products according to changed consumer behaviour and switched to D2C (Direct to Consumer) business model⁸.

Innovations

Realising their creative skills and how the pandemic would impact artisans' livelihoods, organisations, governments, and individuals encouraged artisans.

- Enamor has procured Ikat handloom fabric from the Kalabharathi handloom craft cluster in Telangana.
- Amazon India waived off the fee under the aegis of its 'Stand for Handmade' programme to support artisans and entrepreneurs from 'Amazon Kaarigar' and 'Amazon Saheli' initiatives.
- The Jharkhand Department of Posts tied up with Kasturba Gramodyog Sansthan, Ranchi, to promote khadi masks through post offices to boost eco-friendly crafts and handlooms while promoting livelihoods.
- TRIFED and UNICEF joined hands to initiate the 'Covid-19 Teeka Sang Surakshit Van Dhan aur Uddyam' campaign. Unique in its approach, this initiative safeguards and restores tribals' livelihoods, health and wellness and naturally supports artisans engaged in handlooms and the arts.
- Craft, art, tradition and vaccine advocacy: Recently, artist Kundan Roy's Mithila painting depicting a medical staff vaccinating a woman went viral.⁹

8. <https://ich.unesco.org/en/living-heritage-experience-and-Covid-19-Covid-19-19-19-pandemic-01124?id=00134>

9. <https://indianexpress.com/article/lifestyle/art-and-culture/national-handloom-day-2021-nurturing-handlooms-crafts-and-arts-during-Covid-19-Covid-19-19-19-7442807/>

2. Festivals

Cultural festivals are an emerging sector in India and has huge growth potential. With an estimated footfall of between 200,000 to 300,000 people per day in the city of Kolkata alone, Durga Puja is one of the largest public carnivals in the world. 65 per cent of festival goers in India are under the age of 30 and open to emerging art forms and international content. Due to physical distancing restrictions imposed due to Covid-19, this sector faced a setback as festivals necessarily mean direct and face-to-face interaction between artists, audience and art forms. Most festivals in 2020 were cancelled or postponed due to the physical distancing restrictions. The cashflow was naturally impacted due to the cancellations and cultural festivals experienced a difficult time for survival.

- Events such as the Jaipur Literature Festival, Tata Literature Live! and The Mumbai LitFest transitioned to online editions
- Major concerts and festivals, such as the International Women Folk Dance Festival organised every year in India by Charu

Castle Foundation, have been cancelled, affecting the movement of more than 2,000 artists across the nation.

- The crisis has resulted in loss of employment, drop in sales of goods and services and purchase of intermediate inputs.

Festivals are now on the pathway to revival with digital innovation opening avenues for an evolved form of interaction between the artists, artforms and the audience, Some major art festivals like Kolkata Literary Meet, India Art Fair and Surajkund Mela will be back in 2022 in face-to-face format, while festivals like Chennai Photo Biennale and Tata Literature Live will hold the festivals digitally in 2021.

“These are certainly unprecedented times, but I see a massive opportunity in this crisis”, says Shailendra Singh, Joint Managing Director, Percept Group, the media, entertainment and communications company that put India on the electronic music map with the Sunburn Festival. “We often tend to do the same things over and over again. The Covid-19 situation has forced us to think out of the box and that’s a great thing. The human race is a remarkable one that has

Timbre of performances changed

Several performers were also forced to rethink the relevance of their art form as they explored digital avenues from Instagram live videos to Zoom calls.

- The big shift for 32-year-old harmonium player Zakir Dhaulpuri was turning to the web to continue to impart lessons to his students. Dhaulpuri said. “At least the children were occupied. But music is a prayer (ibadat) and children need to learn it, and experiment with it, in your physical presence.”
- The shift to the digital medium also required investment. Hindustani classical singer Shubha Mudgal said, “The realisation that I would have to equip myself for a long period of online events also meant investing in some semi-professional equipment for such activities. And by that, I mean that the prices had gone up, in some cases, by 200 per cent or even more. We have survived by sheer dint of our ability to adapt and move ahead.”
- Theatre actor and radio jockey Roshan Abbas, who co-founded arts collective Kommune, said, “Instead of a stage manager, what we needed was a Zoom manager who knows when to cut and switch screens and a sound manager who could manage mics on the platform. Purists can continue to enjoy the live experience, but the future belongs to digital live experience creators and technologists.”¹⁰

always risen to the occasion. And we will rise. It won't be easy, but we will get there with a fresher and newer mindset and perspective. Those who have always had their eyes and heart on the needs of the consumer will come up with plan that'll rewrite the basics of this industry", he said.¹¹

3. Indian performing arts

Institutions and artists made archival material available online, offered lessons, and presented concerts and recitals virtually. A significant number of performing artistes have been approaching Artists United¹². Many of them unknown and from towns away from the main urban centres, and an indication of the artistic

talent that is longing to find a space to express and perform.

Indian theatre groups and venues witnessed the lights go out on stage but found ways around the limitations of a lockdown and a virus. The Red Curtain announced the winners of The Good The@ter Festival, featuring live performances, online. A play from Brazil that had a 25-strong cast and crew performing simultaneously from three continents won the Best Production Award. Sumit Lai Roy, Festival Co-Director and Founder Member said "As far as theatre goes, geography has now become history."¹³

Ways of living changed

Ghazal maestro and composer Sudeep Banerjee says, "A lot of musicians I know from Kolkata started selling vegetables and fish in the market. That's how bad it's been. Even when auditoriums were briefly opened up in Mumbai after the first Covid- 19 wave, we were charged the full amount for booking the space despite the limit of 50 per cent seating capacity. This is a huge struggle that will turn away youngsters from entering the arts."

Kathak exponent Vidha Lal too has a similar story. Because of a lack of opportunities, she has now gone full time into teaching and is trying to bring out a line of customized light-weight jewellery for stage dancers. "We are relearning new ways but we need help."¹⁴

11. <https://www.firstpost.com/entertainment/reeling-under-Covid-19-19-19-impact-indias-live-events-giants-mull-future-approach-for-audience-changed-by-pandemic-8437481.html>

12. By the second half of March, having lost out on more than six concerts in India and abroad, Borkar — considered among the finest musicians of his generation — came up with the idea for Artists United (AU). <https://www.firstpost.com/living/coronavirus-outbreak-will-indian-classical-worlds-move-online-prompt-offline-paradigm-shift-reimagining-of-future-8259491.html>

13. <https://www.highereducationdigest.com/the-red-curtain-international-announces-the-winners-of-the-good-theter-festival>

14. <https://timesofindia.indiatimes.com/blogs/living-with-arts/arts-on-ventilator/June-2021>



4. Bookstores

Big and small had a difficult time with lockdown restrictions, as did sections of the publishing business: With Amazon and Flipkart already having an edge in the delivery department, bookstores hoped that customers would eventually return for the unique experiences their physical spaces offered. For an industry in decline, the urgency to transition to new media was underscored by the lockdown.

5. India's film industry

The world's largest in terms of the number of films produced, has not been immune to the impacts of the coronavirus pandemic. According to a 2020 report from accounting firm Ernst & Young, India had around 9,527 screens out of which there were around 6,327 single-screen theatres and 3,200 multiplexes.

Last year, around 1,000 screens shut down permanently.¹⁵

Theatres across the country are now reopening and according to the Multiplex Association of India, the releases in the next three months (October to December 2021) will help box office collections hit around INR 6,000 crores this year, compared with INR 2,000 crores last year as movie halls were closed from March. The collections are expected to reach INR 10,000 crores next year, the same level as in 2019. What reinforces the confidence of the industry is that India's largest cinema chain PVR plans to add 40 screens across the country in this financial year, matching its pre-pandemic level of expansion. The other multiplex operator INOX Leisure is looking to add 20 screens by March next year.

Contemporary, indie and commercial music

The Events and Entertainment Management Association (EEMA) in 2020 conducted a member survey with 170 companies that were affected by Covid-19. After the event cancellations following the virus outbreak, 63.1 per cent of the live event companies in India reported revenue losses of up to INR 1 crore. However, there seems to be no way to measure the impact of the pandemic on independent musicians who are solely dependent on live gigs for income.¹⁶

The lockdown also led to a bunch of new initiatives and one of them was New Delhi-headquartered ticketing platform Skillbox, which shifted its focus to selling passes for virtual shows hosted on its own website. The switch helped raise their profile among the indie music community, and as a result, for the past few months, more gigs by independent acts — as opposed to mainstream and regional music artists — have been listed on Skillbox than on Bookmyshow and Insider.¹⁷

The five major developments in the world of music are:

- Long-distance collaborations are normal now
- People have been spending more time learning music
- Live performances look different. Today, online concerts are much more advanced - with quality production, excellent audio and video, and ways for artistes to speak directly to their fans.
- Social media and streaming are more important than ever before. The value of social media will only grow over time, and artistes have been spending time experimenting with new features and virtual tools.
- Everyone is building new skills at home. It became necessary to learn how to record audio, shoot videos, edit music videos, and even build a promotion plan online.

15. <https://www.dw.com/en/how-indias-Covid-19-19-crisis-has-changed-bollywood/a-58291931>

16. <https://thewire.in/culture/indias-indie-musicians-struggle-as-Covid-19-19-restrictions-reduce-their-incomes-by-half>

17. <https://www.firstpost.com/art-and-culture/indie-music-insiders-on-their-one-big-takeaway-from-Covid-19-19-19-crisis-impact-on-the-live-performance-scene-9337401.html>

6. Galleries

For India’s museums and art galleries, the year has been no less challenging because of the temporary, but prolonged, closures of the physical exhibiting spaces. And yet, they have demonstrated remarkable adaptability. There has been a major transformation in the way exhibitions are shown and artworks sold in India. Of note are the National Gallery of Modern Art’s digitisation of its collection and virtual exhibitions on pioneering artists such as Raja Ravi Varma and Jamini Roy, digital partnerships between galleries resulted in the launch of ‘TAP India’ and ‘In Touch’; and the Saffron Art Partner Galleries programme, where the auction house hosts modern and contemporary art exhibitions on its website.¹⁸

Accessibility has increased manifold with online exhibitions, auctions, and sale of artwork expanding their reach to include students and artists in India. Due to online teaching, lectures, demonstrations, and speeches by many art academicians from several world-renowned universities have been accessible in India.
<https://www.thehindu.com/education/art-in-a-post-covid-world/article34734177.ece>

The Art Basel and UBS 2020 mid-year Covid-19 survey on global modern and contemporary gallery sector throughout the first six months of 2020. The survey is based on responses from 795 galleries operating in the modern and contemporary art sectors, representing 60 different national markets across all levels of turnover presented the following key findings:

- One third of galleries were downsized during the first half of 2020, losing an average of four employees despite having very tight employment structures.
- Online Sales: The growth of online sales accelerated in 2020 for galleries at all levels, offering a way to continue sales efforts while physical spaces were closed

or restricted. The share of online sales for the galleries surveyed was 37 per cent of total sales in the first half of 2020, up from 10 per cent in 2019. The value of spending was relatively high across the three regions (US, UK and Hong Kong): a majority (56 per cent) of collectors had spent over \$100,000 in the first half of 2020, including 16% spending over \$1 million. The millennial segment had the largest share of high spenders, with 17 per cent having spent over \$1 million (versus just 4 per cent of boomers).¹⁹

7. Museums

The top 100 museums around the world saw a 77 per cent drop in footfall due to the Covid-19 pandemic. Most of them remained closed throughout 2020, with the total number of closure days of the 100 top museums amounting to 41,000 days.²⁰ In India in 2020, museums were closed for an average of 155 days, and since the beginning of 2021, many of them have again had to shut their doors, resulting, on average, in a 70 per cent drop in attendance and a 40-60 per cent decline in revenue compared to 2019.

- The enterprising spirit was evident when DAW encouraged 37 art galleries to participate in the Delhi Art Week (DAW), an initiative aimed at raising awareness and bringing attention to art in Delhi. “There are so many galleries in Delhi that have been doing exemplary work over the years, but everyone may not be aware of all of them. This puts everyone on the same platform, leading to public awareness,” says Tuntty Chauhan, Director, Gallery Threshold.^{21 22}
- One of the biggest museum projects in India is about to open later this year – the Museum of Art & Photography situated in Bengaluru. Although the pandemic has delayed the physical opening of the museum building, it has opened virtually.

18. <https://indianexpress.com/article/lifestyle/art-and-culture/coronavirus-cases-Covid-19Covid-19Covid-19-19-19-museums-soirees-galleries-online-slae-6317544/>

19. <https://artbasel.com/stories/the-impact-of-Covid-19Covid-19Covid-19-19-19-survey-press-release>

20. <https://www.forbesindia.com/article/news-by-numbers/international-museum-day-the-impact-of-Covid-19Covid-19Covid-19-1919-closures/68007/1>

21. <https://www.delhiartweek.com/>

22. <https://indianexpress.com/article/lifestyle/art-and-culture/delhi-art-week-brings-together-museums-art-institutions-and-37-galleries-to-put-art-back-in-the-spotlight-7262318/>

This also allowed to gain some revenue through the specially created one-in-all online membership.

8. Home chef culture

With the onset of the lockdowns, restaurants across the country shut operations overnight. Eating out or ordering in out of compulsion, or to relax with friends and family, or to satiate the foodie within all came to a grinding halt. From then on, the food landscape in the country began to register interesting trends, one of which was the rise of the gourmet home kitchen. For pop-up experiences, which rely on word-of-mouth, social media, and repeat customers for their profits, it was tough for some time.

All the chefs agree that with cities coming out of lockdown, there is bound to be a dip in sales, but the belief is that those who have been consistent and unique will continue to enjoy

patronage²³. The market has changed with more people now taking to the idea of ordering in, not only from their favourite restaurants, but from the chefs they have come to know and love.²⁴ Convenience and variety with the post-Covid-19 drivers of downsized spending, safety and hygiene in a transparent setting are however building consumer confidence. Further innovative possibilities being considered include various digital features like live kitchens and streaming.

9. Gaming

The gaming industry in India saw a surge during the lockdowns last year. In terms of biggest trends in 2021, gaming is becoming more interactive, immersive and social and gaming technologies are becoming more affordable. The emphasis has shifted to localised themes and games. Many indigenous game developers are building titles in multiple local languages for customised content. Other enablement have been the introduction of cloud gaming services Arcade and Stadia, advancement in Augmented Reality (AR) and Virtual Reality (VR), smartphone penetration with affordable and faster data, growth of digital ecosystem for payments along with growing investments in the sector. Increased recognition and growing popularity amongst the youngsters have made it a valuable career option.

- The gaming platforms had seen approximately 50 per cent growth in new user registrations and witnessed around a 20 per cent increase in terms of daily active users.
- EY-FICCI Report 2021 estimates that the online gaming industry will continue to grow and reach 500 million gamers by 2025 to become the third-largest segment of the Indian M&E sector.²⁵



23. <https://www.thenationalnews.com/lifestyle/food/2021/08/17/the-rise-of-gourmet-food-at-home-in-india/>

24. <https://www.firstpost.com/art-and-culture/a-bleeding-industry-pandemic-brings-devastation-and-a-few-opportunities-to-the-pop-up-food-experiences-9804511.html>

25. <https://www.exchange4media.com/digital-news/gaming-platforms-have-seen-nearly-50-growth-in-new-user-registrations-after-Covid-19Covid-19-19-114556.html>

C. Financials

In March 2020, when India went under lockdown, galleries closed, auctions went completely online, and art fairs and festivals were postponed indefinitely. Just when things seem to be on their way back to normal, came the second wave of the pandemic in March, stronger and more powerful than the first. People from all walks of life stepped forward to help in any which way they could and so did the art fraternity.

- The DAG sale that featured 51 works from the gallery collection raised an amount of INR 1 crore that was donated to the Sood Charity Foundation, Khalsa Aid India and the Hemkunt Foundation. The Chitrakar relief sale by the Baro market, an online marketplace brought together artisans and designers, and held an SOS fundraiser to support practitioners of traditional Indian art forms such as Pattachitra, Gond art and Gadwakam. The auction was sold out in a few days, and the proceeds went to the craftspersons and students belonging to the various schools of art.
- A statement by Saffronart said its 24-hour online fundraiser auction held in the second half of May raised over INR 2 crores, all of which went towards helping the grassroots non-profit organisations, including Dastkar, FICA, Khoj and Street Survivors, working to provide medical support and daily subsistence to those in need. Highlights of the sale included an untitled work by Amrita Sher Gil, a watercolour on paper by Ganesh Haloi, a 2015 oil on canvas by A Ramachandran, as well as significant works by Ram Kumar, Krishen Khanna, K G Subramanyan, Thota Vaikuntam and Sudhir Patwardhan.²⁶

StayINaLIVE campaign on GiveIndia released their last cycle in the midst of the second wave

and have released grants to 17 artists since amounting to INR 2,65,000. Since the launch of the fund, the campaign has released six grant cycles and supported 43 artists. The grants awarded are between INR 10,000 and INR 20,000. A total sum of INR 6,60,000 has been disbursed so far. StayIN aLIVE continues to host digital events and collaborate with a range of organisations to raise money for the emergency fund. Donate here - <https://stayinalive.giveindia.org>²⁷

- Artists also came to support artists. The Assistance for Disaster Affected Artistes, or ADAA, initiated by a group of independent artists such as musicians Aneesh Pradhan and Shubha Mudgal, provided INR 5,000 per month to more than 100 artists. Also, in May 2020, the Shubhendra and Saskia Rao Foundation, organised an eight-hour-long online concert Music for Hope that raised six lakhs for artists and frontline personnel.

Budgetary allocation: The Art and Culture Budget Guide report of 2021-22, released by the Sahapedia²⁸, has found that support for the arts and culture sector in India which employs millions has diminished. The 2021-22 budgetary allocation for the Ministry of Culture, as an example, constitutes less than one tenth of 1 per cent of the entire Union Budget. The pandemic came as a blow, in the form of allocations in the previous year's budget being slashed by almost 21 per cent. The report notes the lack of budgetary support for arts and culture from the union and state governments as unique, when compared to other major economies in the world. The report also cited large vacancies in key cultural institutions, dealing in both tangible and intangible heritage, such as the Archaeological Survey of India (ASI), the prominent public libraries and archives, as well as the flagship academies, which conduct research in languages, indigenous cultures, among others.²⁹

26. <https://www.financialexpress.com/lifestyle/brushstrokes-of-support-art-world-steps-in-to-help-in-Covid-19-19-relief-through-online-auctions/2261724/>

27. <https://insider.in/stayin-alive-fundraiser/article>

28. <https://www.sahapedia.org/about-us>

29. <https://www.sahapedia.org/budget-guide>

Corporate Social Responsibility and the Arts

Companies more than halved their funding for national heritage, arts and culture, under Corporate Social Responsibility (CSR). National heritage saw the largest drop of nearly 56 per cent in 2018-19, even as spending on the welfare of armed forces increased by 84 per cent, registering the highest growth.³⁰ Yet there have been significant initiatives that have reached out to empower artisans and create livelihood opportunities. Snapshots include:³¹

- More than 6,000 traditional handloom weavers from across six handloom clusters in India have been trained under Project 'Handmade in India' (HMI) by the Entrepreneurship Development Institute of India (EDII) since the onset of the Covid-19 pandemic. Implemented jointly by EDII and Ernst & Young LLP (EY) and supported by HSBC, the project intends to instil self-reliance among traditional weavers. Interventions such as credit linkage, capacity building, market linkage, design development, social media marketing and enterprise development were conducted at handloom clusters of Maheshwar (Madhya Pradesh), Bhuj (Gujarat), Surendranagar (Gujarat), Kamrup (Assam), Bargarh (Odisha), and Salem (Tamil Nadu).
- In view of the continuing pandemic, DAG announced its second fundraiser sale of 51 works from its collection to raise critical funds to benefit charity institutions working towards Covid-19 relief across communities in India. In 2020, DAG donated INR 1.8 crores and supported different charities to benefit their Covid-19 relief initiatives.
- Rare Planet, a young start-up focused on uplifting rural artisans, has included over 5,000 artisans to its network from over ten cities in five states. The brand procures Indian handmade products from these artisans and retails it further through online and offline platforms, and provides the right value.
- National Fertilizers Limited (NFL), a PSU under the Department of Fertilizers, has displayed Maharashtra's famous Warli painting on the outer walls of its corporate office in Noida with a view to promote Indian folk art.
- Samvaad, organised by Tata Steel is a platform that seeks to revive, preserve and promote tribal culture.³²
- Music concerts and festivals such as Rajasthan Maharana Kumbha Sangeet Samaroh (an annual Indian classical music and dance festival whose 58th edition was held virtually in December 2020) by Hindustan Zinc Limited.
- Okhai, established by Tata Chemicals Society for Rural Development (TCSRSD) with a mission to encourage and empower women in the rural areas, has launched a helpline for artisans across the remotest parts of India on the occasion of International Day of Rural Women.³³

Alongside new opportunities have emerged which may be supported by CSR:

- The massive digitalisation in recent months in the culture and creative sectors is clearly not temporary and could create new forms of experience and business models with market potential.
- Building more links between commercial activities and entities such as museums, theatres, libraries can also enhance the sustainability of the non-commercial parts of the sector which rely on public funding.
- New strategic complementarities can be pursued between culture and policies to promote health and wellbeing.³⁴

30. <https://timesofindia.indiatimes.com/business/india-business/companies-cut-csr-spends-on-national-heritage-by-56/articleshow/73752343.cms>

31. <https://indiacr.in/corporate-governance/>

32. <https://www.tatasteel.com/initiatives/samvaad/index.html>

33. <https://indiacr.in/csr-okhai-launches-helpline-for-rural-artisans-across-india/>

34. <https://www.oecd.org/coronavirus/policy-responses/culture-shock-Covid-19-Covid-19-19-19-and-the-cultural-and-creative-sectors-08da9e0e/>

D. An overview of best practices from other countries:

The creative economy accounts for about 3 per cent of global GDP, according to a 2015 study by professional services firm EY. In the UK, creative industries made a record input to the economy in 2017, contributing £101.5 billion to country's coffers, and grew at nearly twice the rate of the economy since 2010. The worth of the creative economy is much more when cultural value is added to its commercial gains.

The present crisis has sharply exposed the structural fragility of this sector which includes micro-firms, non-profit organisations and creative professionals, often operating on the margins of financial sustainability. The dip in international and domestic tourism, drop in purchasing power, reductions of public and private funding for arts and culture, especially at the local level, is continuing to impact the sector.

Responsive public support and recovery strategies are important not only to strengthen the sector but also for creating vibrant communities. Towards these countries globally announced relief packages to support organizations and artisans to support the creative world hit hard by Covid-19.

The year 2021 was declared the International Year of Creative Economy for Sustainable Development at the 74th United Nations General Assembly. UNCTAD Deputy Secretary-General Isabelle Durant said the resolution was timely. "The creative industries are critical to the sustainable development agenda. They stimulate innovation and diversification, are an important factor in the burgeoning services sector, support entrepreneurship, and contribute to cultural diversity," she said. Without them, the economic development, women's empowerment, and cultural and poverty alleviation targets within the SDGs are unlikely to be met."

Packages announced by countries across the globe and to support the sector:

- In Indonesia, which brought the resolution to the UN General Assembly, the creative economy contributes 7.4 per cent to the nation's GDP. It also employs 14.3 per cent of its workforce - from craft to gaming, fashion to furniture.
- The Government of France announced a plan to offer EUR 2 million to struggling midsize art galleries.³⁵

In 2020, the US, through the Coronavirus Aid, Relief, and Economic Security (CARES) Act, and the National Endowment for the Arts awarded \$75 million to support staff salaries, fees for artists or contractual personnel, and facility costs for struggling non-profit arts organisations. Other national efforts have included the Artist Relief fund (an initiative of several arts grant-makers), MusiCares Covid-19 Relief, the Actors Fund emergency financial assistance, and the Andrew W. Mellon Foundation's Crisis Relief Grants.

On the regional level, some states and local governments have set up relief programs targeted at arts.³⁶ The tourism industry, a key economic driver for the culture sector, also gained some countries' attention.

UK Government:

According to Oxford Economics, the Creative Industries are projecting a combined £77bn turnover loss over the course of 2020 compared to 2019 (-31 per cent). This is expected to translate into a GVA shortfall of £29bn in 2020 compared to 2019 (-26 per cent), over half of which is in London.

In 2020, CIs are projecting a 122,000 drop in employment among employees (despite the Coronavirus Job Retention Scheme - JRS) and a further 287,000 job losses among self-employed workers, compared to 2019 levels. In total, 409,000 CI jobs are considered at risk, 27 per cent of which are in London and 20 per cent are in the South East.³⁷

35. <https://news.artnet.com/market/france-direct-aid-galleries-1936384>

36. [https://www.arts.gov/sites/default/files/COVID 19 COVID 19 19 COVID 19 19 19-Outlook-Week-of-1.4.2021-revised.pdf](https://www.arts.gov/sites/default/files/COVID%2019%20COVID%2019%2019-19-Outlook-Week-of-1.4.2021-revised.pdf)

37. <https://www.oxfordeconomics.com/recent-releases/The-Projected-Economic-Impact-of-COVID-19-on-the-UK-Creative-Industries>

Top-line insights from the UK

- The gaming platforms had seen approximately 50 per cent growth in new user registrations and witnessed around a 20 per cent increase in terms of daily active users.
- EY-FICCI Report 2021 estimates that the online gaming industry will continue to grow and reach 500 million gamers by 2025 to become the third-largest segment of the Indian M&E sector
- The cultural sector has suffered a 60 per cent drop in economic output over the past 18 months, as per the University of Sheffield
- Restrictions led to 55 per cent of sector jobs being furloughed - well above the national average of 16 per cent - and more than 80,000 arts professionals applied to the Self-Employment Income Support Scheme (SEISS)
- This amounts to 68 per cent of eligible freelancers in the UK³⁸

The UK government in its Budget 2021, has pledged £408 million to support the arts sector. The funding is intended to help museums, theatres, and galleries to reopen when coronavirus restrictions ease. Details of the investment include:

- £300m will go into the Culture Recovery Fund
- £90m to help government-sponsored National Museums and cultural bodies in England stay afloat until they can reopen
- £18.8m for local cultural infrastructure projects in Carlisle, Hartlepool, Wakefield and Yeovil to boost the cultural life of the towns and cities
- £77m will go towards supporting culture groups in the devolved administrations in Scotland, Wales and Northern Ireland³⁹

A Global Agenda for the Cultural and Creative Industries Launch: 11 Key Actions

Derived from a two-year long discourse on the needs of the global Cultural and Creative Industries (CCIs), the PEC International Council's 11 actions call for a rethinking of many established areas of policy, particularly at the international level. These range from how we interpret the definition of funding of research and development, to how we prioritise data collection about self-employed people and the informal economy, to the focus of social impact finance initiatives. However, this agenda is not the end of the conversation: now international policy leaders need to take its tenets into the mainstream. Otherwise, not only do we risk losing creative communities across the world, but we lose a broader opportunity to tackle the most significant global issues of our time, from wealth redistribution to climate change. We call on policymakers worldwide to capitalise on the momentum generated by the UN designation of 2021 as 'International Year of Creative Economy for Sustainable Development'. The experience of the pandemic has reinforced the value of the Cultural and Creative Industries to audiences and practitioners worldwide. With bold action governments can further release the power of creativity to the benefit of their communities, economies and their international partnerships. Now is the time to act.

<https://pec.ac.uk/assets/publications/PEC-A-Global-Agenda-for-the-Cultural-and-Creative-Industries-v11.pdf>

Read the agenda

38. <https://www.artspromotional.co.uk/news/newsreel/half-arts-sector-jobs-were-furloughed>

39. <https://www.icon.org.uk/resource/budget-2021-chancellor-announces-400m-to-support-t-the-arts-sector.html>

The Creative Industries Federation has responded to the Chancellor's Budget and Spending Review. The response praised doubling tax relief for museums, galleries, theatres and orchestras, £850m in post-pandemic support for culture and heritage institutions, and £14m a year in scale-up funding for creative SMEs. It called for further R&D tax relief. Later this month, the Creative Industries Federation will officially merge with Creative England and relaunch as Creative UK.⁴⁰

E. Government of India policies and schemes

State governments have offered various kinds of support to the artists. This include:

- decision by the Rajasthan government to provide one-time financial assistance of INR 5,000 to artists reeling under financial troubles due to the Covid-19. Rajasthan Chief Minister Ashok Gehlot said, "In the wake of difficult circumstances arising out of the Covid-19 pandemic, a decision has been taken to provide one-time help of INR 5,000 to artists in the state who are facing financial problems. Around 2,000 financially weak and needy artists will get relief due to this."⁴¹
- The Kerala Department of Culture launched the Covid-19 financial assistance programme in February 2021 to offer financial assistance to artists who have been working in the arts field for 5 years.
- The Maharashtra government has decided to disburse INR 5,000 to every eligible folk artist in the state under a welfare scheme aimed at reducing the impact of the coronavirus pandemic and resultant lockdowns. As many as 56,000 artists will be covered under the scheme.⁴²
- Through the Uttar Pradesh One District One Product scheme, the UP government will employ such lost artists and will render monetary support to the small-scale industries in all the districts famous for some products. Through this scheme, 25 lakh people will get employment in the time frame of five years in 75 districts of UP.⁴³ The Uttar Pradesh government has launched a 5-star luxury cruise from the Khirkiya ghat in Varanasi named Alaknanda. The cruise liner will offer a new experience to the local people and the tourists visiting the ancient city.⁴⁴

Policy recommendations for cultural and creative sectors⁴⁵

- introduce measures for the recovery to help the self-employed and other small firms adapt to structural changes (e.g. shifts in consumer habits) and seize new opportunities, including digital tools
- widen innovation strategies and policies to better account for the role of cultural and creative sectors
- skill development particularly in the use of new digital tools that build on gaming technologies and new forms of cultural content
- develop new local strategies for cultural tourism that address the socially and environmentally unsustainable practices of many large-scale or intensive tourism centres
- targeted cultural policies to address social issues such as intercultural dialogue

40. [https://www.creativeindustriesfederation.com/sites/default/files/2021-10/members%20CSR%20summary%20281021%20\(004\).pdf](https://www.creativeindustriesfederation.com/sites/default/files/2021-10/members%20CSR%20summary%20281021%20(004).pdf)

41. <https://www.indiatoday.in/india/rajasthan/story/rajasthan-govt-Covid-19Covid-19-relief-financially-weak-artists-1813828-2021-06-12>

42. <https://www.dailypioneer.com/2021/india/maharashtra-cabinet--support-reservation-in-promotion-in-govt-jobs.html>

43. <https://aatmnirbharsena.org/blog/one-district-one-product-scheme/>

44. <https://www.sundayguardianlive.com/news/odop-scheme-revives-dying-art-crafts-uttar-pradesh>

45. <https://timesofindia.indiatimes.com/travel/destinations/up-cm-yogi-adityanath-launches-luxury-cruise-in-varanasi-costs-inr-750-per-ride/as65671088.cms>

46. <https://www.oecd.org/coronavirus/policy-responses/culture-shock-Covid-19Covid-19-and-the-cultural-and-creative-sectors-08da9e0e/>

- promote greater complementarities between culture and other policy sectors; health care and social services can benefit from greater linkages with cultural and creative sectors to improve wellbeing
- support cultural and creative entrepreneurship as catalysts of new models of economic and social value creation.

F. Looking ahead: Returning to “Normal”

The Monthly Economic Review released by the Department of Economic Affairs stated that despite the impact of the second wave, India reasserted its V-shaped recovery. Even as the FY2021-22 Q1 output was impacted by the severe second wave, it was large enough to post a year-on-year growth of 20.1 per cent, recovering more than 90 per cent of pre-pandemic Q1 output of FY2020-21. “India’s real GVA has also grown to a similar extent YoY at 18.8 per cent posting a recovery of more than 92 per cent of its corresponding pre-pandemic level. These estimates reaffirm India’s resilient V-shaped recovery despite an intense second wave,” the report stated.⁴⁶

As vaccine rollouts continue across the world, arts organizations are starting to move more actively into ‘return-mode’. The report *Living Heritage in the Face of Covid-19* suggests three broad areas of action for post-pandemic recovery plans. First, it will be important to strengthen direct support mechanisms to living heritage bearers. Secondly, opportunities offered by digital technologies to support resilience and safeguarding and to increase the visibility and recognition of living heritage must

be leveraged. Finally, the integration of living heritage safeguarding into emergency preparedness, response and recovery plans should be intensified.⁴⁷

G. Conclusion

The ability to adapt is needed now and will become even more relevant going forward considering the fast-changing and uncertain environment the institutions find themselves in. The literature review indicates the need for the sector to rethink strategies and business models and leadership capability to ensure both economic survival and versatility through innovation. To provide a competitive digital offering, organisations need to invest funds they do not currently have and may need to retrain the staff or recruit new employees. This also requires financial resources and will take time. Along with this understanding the economies of small artists and musicians, and the millions of informal workers across all creative industries is needed. This will lead to realising the economic potential of the sector measuring and assessing the support needed for measuring growth and employment. Flexibility of the policy makers and regulating bodies is crucial for the success of this process.⁴⁸

Culture has inspired us and it is to cure that people have turned to in this time. Organisations had adapted and innovated and inspired when we needed them the most. In the words of the Classicist, Professor Mary Beard, ‘We will look back to these dark and cloudy times as the moment when we really did harness technology to open up the best of what arts and culture have to offer on a wider and grander scale.’⁴⁹

46. <https://www.businesstoday.in/latest/economy/story/despite-intense-second-wave-india-reasserts-v-shaped-recovery-economic-review-306291-2021-09-09>

47. <https://ich.unesco.org/en/living-heritage-and-the-Covid-19>

48. <https://www.sdabocconi.it/en/news/20/12/the-impact-of-Covid-19-on-the-future-of-performing-arts-a-survey-of-top-industry-executives-in-europe-and-the-us>

49. <https://www.ox.ac.uk/news/features/creative-industries-innovative-capacity-can-help-lead-us-out-pandemic>

Research methodology

The research methodology includes primary and secondary sources and triangulation of evidenced data.

Triangulation of data from Taking the Temperature surveys, independent sector body research, and some government reports has enabled for the first time a robust record the creative industries contribution to India's GDP.

The survey on an average took 15 to 20 minutes to complete. In sum that amounts to 47 hours spent in total by 1040 arts companies, sector bodies and individual artists and freelancers. This is the first time such a major study has been completed by so many.

An online quantitative survey was completed by arts companies, sector organisations, artists

and consultants in creative economy in India for the final round. The survey was designed in MS Forms and the link was shared with creative sectors.

The survey included questions to understand the profile of the creative sectors and the organisations they belong to (if any), impact on programming, continuity and changes in financials, adaptations mechanisms adopted and the perceptions about the future. These questions helped to gather the insights on the pandemic's effect on the creative sector.

1,040 surveys have been completed over the course of the three reports including.

- new creative sectors: those who took the Taking the Temperature survey for the first time
- repeat creative sectors: those who had responded to the previous rounds of the survey

Sample size across three rounds of surveys:

| Round 1 (Apr, '20) | Round 2 (Sep–Oct, '20) | Round 3 (Apr–May, '21) |
|-----------------------|------------------------------|------------------------------|
| 310 | 432 | 298 |



The third survey was open from 17 March to 11 June 2021. Originally, the survey was to remain open for four weeks, but the deadline for responses was extended due to the onset of the third wave of the pandemic.

In the second round, the survey was made available in multiple Indian languages like Hindi, Bangla, Malayalam, Telugu, Kannada and Tamil, along with English. Telephonic interviews were also offered to help creative sectors fill in the surveys. The feedback received from these efforts was that the feedback was easily administrable in English and the third round was only rolled out in English.

The research methodology and analysis are consistent with the previous two rounds. Some edits and additions in the questionnaire were done from the previous rounds to collect additional information and make the questionnaire relevant for both repeat and new responders.

Relevant comparison of the data has been drawn from all three survey rounds for some questions. The comparison is not direct and is explained further in the limitations section. Nevertheless, it informs the overall picture.

51 creative organisations participated in all three rounds of the survey. A comparison study of these was mapped and narrated in the report.

In-depth interviews were also carried out with 12 key creative sector bodies for a deeper understanding of the impact and a series of sector focus groups augmented the data surveys.

Case studies provide a snapshot of initiatives taken by the creative industries and government sectors to deal with the impact of Covid-19. Secondary research further strengthened this report.

The report was drafted by Smart Cube and the British Council. It has been peer reviewed by Jonathan Kennedy, Director Arts, India, British

Council; Anvesha Khandelwal Punjani, Head of Research, Monitoring and Evaluation, India, British Council; Paramita Chaudhuri, Head Arts East and Northeast India, British Council; Rashmi Dhanwani, Founder-Director, Art X Company and Sanjoy Roy, Co-chair, Creative and Cultural Industries, FICCI.

The data and analysis in this report has followed all the protocols of ethical research and ensures confidentiality of commercially sensitive research findings.

The survey on an average took 15 to 20 minutes to complete. In sum that amounts to 47 hours spent in total by 1040 arts companies, sector bodies and individual artists and freelancers. This is the first time such a major study has been completed by so many.

Limitations

The results from survey three have been compared with the previous two survey rounds (survey 1 and 2), to understand the change in the responses. Some new questions were added, or existing ones were modified, to capture the results more significantly in survey 3. The comparison with previous rounds has not been done for such questions to avoid false assumptions.

The survey was conceptualised as a tracer study, where a sample group would respond to the survey. However, various people have participated in the survey and out of a sample of 298, there were only 51 repeat creative sectors across all three surveys. This mitigated against an exact comparison sample. The findings for these repeat creative sectors have largely been in line with the overall sample, and hence, their data has not been reported separately.

The third survey launch coincided with the third Covid-19 wave across India. This is likely to have impacted the way in which creative sectors would have answered the survey. However, the survey was kept open for a long duration to mitigate that and ensure maximum participation. Telephonic interviews were carried out during that period. While the creative sectors have been analysed as per different categories the responses given by them is not a statistical representation of these categories.

Critical factors to understand India's market size:

- The market size contribution to GDP does not include festivals such as Diwali and Durga Puja during the pandemic.
- The market size of the UK and contribution to GDP are not easily comparable to India. The UK sector is established in the formal economy and has been measured for impact for over two decades.
- Higher income and spend levels and foreign exchange rates limits a direct comparison with India.

There is little precedence for evidence-led policy making in the culture sector in India. This leads to a low response rate for surveys, as cultural sector stakeholders don't always connect studies to evident policy-making and tangible impact on their work in the arts. In addition, the general survey response rate in India is lower than the global average. Hence this study can be indicative of the health of the cultural sector and its stakeholders.

The third survey launch coincided with the third Covid-19 wave across India. This is likely to have impacted the way in which creative sectors would have answered the survey.

References

for the market sizing framework: (Chapter 1)

1. India's nominal GDP
Source: https://www.imf.org/en/Publications/WEO/weo-database/2021/April/weo-report?c=534,&s=NGDP_R,NGDP_RPCH,NGDP,NGDPD,PPPGDP,NGDP_D,NGDPRPC,NGDPRPPPC,NGDPPC,NGDPDPC,PPPPC,&sy=2019&ey=2026&ssm=0&scsm=1&sc=0&ssd=1&ssc=0&sic=0&sort=country&ds=.&br=1
2. Facts and figures on the US Creative Economy
Source: https://nasaa-arts.org/nasaa_research/facts-figures-on-the-creative-economy/
3. Performing arts industry
Source: https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020
4. Design industry landscape
Source 1: <https://www.indiatoday.in/pti-feed/story/indian-design-industry-may-grow-to-rs-18800-cr-by-2020-cii-658547-2016-12-05>
Source 2: <https://startuptalky.com/design-industry-india-future/>
5. Handicraft industry landscape
Source 1: <https://epch.in/policies/exportsofhandicrafts.htm>
Source 2: https://niti.gov.in/planningcommission.gov.in/docs/plans/stateplan/upsdr/vol-2/Chap_b4.pdf
6. Visual arts landscape
Source 1: <http://ficci.in/spdocument/22945/Visual-arts-industry-in-India.pdf>
Source 2: <http://www.newindianexpress.com/business/2021/apr/25/covid-lockdown-a-blessing-in-disguise-for-art-market-2294356.html>
Source 3: <http://gjepec.org/solitaire/indians-are-increasingly-looking-at-auctions-to-purchase-jewellery/>
7. Festivals landscape
Source 1: <https://www.news18.com/news/india/goa-earned-rs-250-crore-from-sunburn-says-tourism-minister-amid-drug-row-2440683.html>
Source 2: <https://www.eventfaqs.com/news/ef-13292/sunburn-10-generates-inr-250-cr-business-for-pune-economy-reveals-percept>
Source 3: https://www2.deloitte.com/content/dam/Deloitte/in/Documents/technology-media-telecommunications/IMI%20report_singlePage.pdf
8. Publishing landscape
Source 1: <https://www.educationworld.in/ey-parthenon-report-on-indian-publishing-industry-shaping-future-of-india/>
Source 2: <https://www.hindustantimes.com/cities/a-textbook-problem-schools-shut-publishers-count-losses/story-V09iDKNu1I0Eq1vOLtG63I.html>
Source 3: <https://www.frontlist.in/a-new-are-increasingly-looking-at-auctions-to-purchase-jewellery/>

report-evaluates-the-indian-publishing-industrys-prospects/

Source 4:

https://www.internationalpublishers.org/images/aa-content/news/news-2020/Post-Covid_Action_Plan_Report.pdf

Source 5:

<https://www.thehindubusinessline.com/blink/cover/publishing-gets-digital-push-during-the-pandemic/article34549999.ece>

Source 6:

<https://scroll.in/article/978968/as-book-publishing-shrinks-during-the-pandemic-how-are-indias-printing-presses-coping>

9. Heritage and public monuments landscape

Source 1: <https://www.niti.gov.in/>

Source 2:

<http://www.businessworld.in/article/Footfall-to-Taj-Mahal-dropped-by-76-pc-in-2020-due-to-COVID-19-situation/17-01-2021-366449/>

10. Advertisement market landscape

Source 1:

<https://assets.kpmg/content/dam/kpmg/in/pdf/2020/09/synopsis-kpmg-india-media-and-entertainment-2020.pdf>

Source 2:

<http://www.e4media.net/mailer2018/dentsu-e4m-DigitalAdvertisingReport2021.pdf>

11. Film and video landscape

Source 1: https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

Source 2:

<https://www.moneycontrol.com/news/business/indias-overall-online-video-market-to-grow-at-26-cagr-to-reach-4-5-billion-by-2025-report-6331211.html>

Source 3:

<https://www.exchange4media.com/digital-news/indias-online-video-industry-made-14-bn-in-revenue-in-2020-mpa-110214.html>

12. Television and radio landscape

Source: https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

13. Online gaming landscape

Source: https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

14. Indian modern and contemporary art market

Source:

<https://www.thehindu.com/society/the-indian-modern-and-contemporary-art-market-is-flourishing-even-during-the-pandemic/article32811528.ece>

15. COVID-19 impact on handicrafts sector

Source:

<https://www.businesstoday.in/opinion/columns/story/covid19-impact-on-handicrafts-sector-handloom-artisans-suffering-due-to-coronavirus-lockdown-270592-2020-08-20>

16. Indian textile and apparel industry report

Source:

<https://aepcindia.com/system/files/Annual%20T%20and%20A%20Industry%20Report-2021.pdf>

17. The return of handicraft exhibitions

Source:

<https://www.thehindu.com/news/cities/bangalore/handicraft-exhibitions-make-a-comeback-after-a-years-gap/article33905674.ece>

18. How India's publishing industry coped with the pandemic year

Source: <https://lifestyle.livemint.com/how-to-lounge/books/how-india-s-publishing-industry-coped-with-the-pandemic-year-111609903670712.html>

19. Challenges in Indian publishing

Source: <https://www.firstpost.com/living/a-closer-look-at-indian-publishing-unveils-a-state-apatetic-towards-books-education-knowledge-8123831.html>

20. Media and Entertainment industry trends 2020

Source: https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

21. Rise in Taj Mahal ticket price for tourists

Source: https://www.business-standard.com/article/current-affairs/taj-mahal-ticket-prices-likely-to-increase-for-tourists-agra-admin-121031600089_1.html

22. Confederation of Indian Industry

Source: <https://web-assets.bcg.com/2b/d6/90c369a34b229e5d7dce8da4706b/lights-camera-action-cii-report-2020.pdf>

23. India's Media and Entertainment report 2020

- Source:
<https://assets.kpmg/content/dam/kpmg/in/pdf/2020/09/synopsis-kpmg-india-media-and-entertainment-2020.pdf>
24. Halt of TV and film shoots
 Source:
<https://bestmediainfo.com/2021/04/industry-fears-revenue-losses-with-shootings-coming-to-a-halt-hopes-for-shoots-to-be-allowed-again-soon/>
 25. Covid-19 impact on India's festive season
 Source: <https://www.voanews.com/south-central-asia/indias-festive-season-poses-fresh-risk-pandemic-crosses-peak>
 26. Economic impact of the recorded music industry in India
 Source:
https://www2.deloitte.com/content/dam/Deloitte/in/Documents/technology-media-telecommunications/IMI%20report_singlePage.pdf
 27. Export of handicrafts from India
 Source:
<https://www.usabusiness.co.in/export-handicrafts-from-india/>
 28. India exports of carpets and other textile floor coverings
 Source:
<https://tradingeconomics.com/india/exports/carpets-textile-floor-coverings>
 29. Handicrafts export falls during Covid-19
 Source:
<https://www.thehindubusinessline.com/economy/handicraft-exports-may-fall-40-this-fiscal-due-to-covid-19/article31954337.ece>
 30. Handicrafts industry trends
 Source:
https://niti.gov.in/planningcommission.gov.in/docs/plans/stateplan/upsdr/vol-2/Chap_b4.pdf
 31. Carpet Export Promotion Council
 Source: http://cepc.co.in/wp-content/uploads/2020/11/CEPC_AR_2019-20_910-corr-P-aa.pdf
 32. Carpet industry in India
 Source:
<https://www.indiantradeportal.in/vs.jsp?lang=1&id=0,30,50,164>
 33. Handloom industry
 Source:
[yush-goyal-calls-for-increasing-handloom-exports-to-rs-10000-crore-in-three-years/articleshow/85126821.cms](https://timesofindia.indiatimes.com/india/piyush-goyal-calls-for-increasing-handloom-exports-to-rs-10000-crore-in-three-years/articleshow/85126821.cms)
 34. Indian publishing industry shaping future of India
 Source: <https://www.educationworld.in/ey-parthenon-report-on-indian-publishing-industry-shaping-future-of-india/>
 35. The impact of Covid-19 on the global publishing industry
 Sources:
https://www.internationalpublishers.org/images/aa-content/news/news-2020/Post-Covid_Action_Plan_Report.pdf
 36. Chennai Book Fair expects footfall to exceed 15 lakh
 Source:
<https://www.thehindubusinessline.com/news/with-800-stalls-chennai-book-fair-expects-footfall-to-exceed-15-lakh/article30588526.ece>
 37. Delhi's Nai Sarak: biggest textbook markets initiative
 Source:
<https://www.hindustantimes.com/cities/a-textbook-problem-schools-shut-publishers-count-losses/story-V09iDKNu1I0Eq1vOLtG63I.html>
 38. How the book industry is grappling with the coronavirus-induced lockdown
 Source:
<https://www.thehindubusinessline.com/news/variety/how-the-book-industry-is-grappling-with-the-coronavirus-induced-lockdown/article31471466.ece>
 39. How are India's printing presses coping during the pandemic
 Source: <https://scroll.in/article/978968/as-book-publishing-shrinks-during-the-pandemic-how-are-indias-printing-presses-coping>
 40. How Covid-19 changed the creative economy in India and abroad
 Source:
<https://www.indiatoday.in/education-today/jobs-and-careers/story/creative-industry-job-how-covid-19-changed-creative-economy-1779984-2021-03-16>
 41. Creative economy to have its year in the sun in 2021
 Source: <https://unctad.org/news/creative-economy-have-its-year-sun-2021>

42. The future of the Creative Economy
Source: <https://www2.deloitte.com/content/dam/Deloitte/uk/Documents/technology-media-telecommunications/deloitte-uk-future-creative-economy-report-final.pdf>
43. Performing arts peak season and earnings
Source: https://www.payscale.com/research/IN/Job=Fine_Artist%2C_Including_Painter%2C_Sculptor%2C_or_Illustrator/Salary
44. Design industry employment and earnings
Source 1: <https://www.jagranjosh.com/articles/creative-economy-shaping-the-future-of-design-1576580107-1>
Source 2: <https://startuptalky.com/design-industry-india-future/>
45. Handloom industry employment, peak season, and earnings
Source 1: <https://pib.gov.in/PressReleasePage.aspx?PRID=1596372>
Source 2: <https://mittalsouthasiainstitute.harvard.edu/handicraft-livelihood-creation-project/>
Source 3: <https://www.vogue.in/fashion/content/how-the-crafts-economy-can-stay-resilient-during-the-covid-19-pandemic>
Source 4: <https://www.ibef.org/industry/textiles.aspx>
<https://www.ibef.org/industry/textiles.aspx>
46. New normal for India's theme parks
Source: <https://thewire.in/business/india-theme-parks-amusement-rides-covid-19-new-normal>
47. Handloom industry employment and peak season
Source 1: <https://www.ndtv.com/business/covid-19-impact-news-newspaper-industry-could-face-losses-of-up-to-rs-15-000-crore-industry-body-2221806>
Source 2: https://www.business-standard.com/article/economy-policy/indias-publishing-sector-the-present-and-future-116011000310_1.html
48. COVID-19 Impact on newspaper industry
Source: <https://taxguru.in/finance/covid-19-impact-newspaper-industry.html>
49. Handloom industry salary
Source: <https://www.payscale.com/research/IN/Industry=Publishing/Salary>
50. The Wyoming Arts Council
Source: https://www.wyomingnews.com/rocketminer/coronavirus/wyoming-arts-council-announces-financial-assistance-recipients/article_9c781fa3-26ca-589f-b147-5ad1e7a6a021.html
51. Museums, heritage and public Monuments peak season
Source: <https://www.outlookindia.com/outlooktraveler/travelnews/story/71079/taj-mahal-got-less-than-1-of-international-visitors-in-2020>
52. Media and Entertainment: The nucleus of India's Creative Economy
Source: https://image-src.bcg.com/Images/BCG-CII-ME-report-India-Creative-Economy-Dec-2017_tcm9-178821.pdf
53. Media and Entertainment employment
Source: <https://www.financialexpress.com/brandwagon/me-could-generate-8-million-jobs-by-2025/2070032/>



Annex

Other British Council research

Further British Council research



Mapping the creative economy around Durga Puja (2019 and 2020)

<https://www.britishcouncil.in/programmes/arts/Mapping-Creative-Economy-around-DurgaPuja>

- The research has pegged the total economic worth of the creative industries around Durga Puja at INR 32,377 crores (GBP 3.29 billion), excluding sponsorships:
 - economic value of 'Installation, Arts and Decoration' pegged at INR 860 crores
 - economic value of 'Idol making' pegged at INR 260-280 crores
- Inward tourism increases significantly, drawing visitors from across the country and increasing retail spending around Durga Puja. For instance:
 - Kolkata sees a 120 per cent spike in bus passengers around Durga Puja, and in air traffic estimated at around 11 per cent.
 - 92 million passengers travelled on a single day in the Kolkata Metro on 3 October 2019. This was a record for Kolkata Metro.
- Arts and Culture festivals such as Durga Puja have the potential to contribute significantly to the state's revenue through festival tourism and other allied industries.
- More research is needed in specific areas as this will add to the economic worth of Durga Puja and other festivals such as the Ganga Sagar Mela.

Recommendations in the Durga Puja report

- mapping creative industries across all tourism domains with partners in the UK and India and strengthening tourism policy across priority states
- preparation of a Sustainable Tourism Policy by the Department of Tourism to provide support towards building narratives around storytelling, sustainability, festivals, heritage with focus on water heritage - 'training locals to become travel guides, home stays and thereby creating livelihood opportunities
- more research based on recommendations e.g. role of women in leadership and decision-making positions in the creative economy around Durga Puja
- using GST figures evaluation for the Durga Puja month as a proxy to assess the retail market
- environmental impact: recycling models such as pandals (marquees), lights and decorations and sustainability initiatives etc. may be analysed
- inclusion and diversity: strengthening engagement with all-women *dhaki* groups (traditional drummers), more women in big *puja* (worship) decision-making and inclusion of the less represented groups
- accessibility: facilitating tourist flow by working for ease of access to Durga Puja for tourists and outward migration of people post Durga Puja

Business of Handmade

2

The research explores the relationship between the informal economy and the cultural economy, by studying 12 creative and social enterprises working in India's artisan sector.

<https://www.businessofhandmade.com/>

Key insights from the report

- A 2017 survey by Dastkari Haat Samiti and the Craft Revival Trust revealed that 75 per cent of the artisans did not know if their handmade products were taxable, and 90 per cent did not know how to claim refunds. Partially literate artisan communities who could not meet compliance requirements found themselves excluded from marketplaces almost overnight or turning to corrupt touts to be able to 'formalise' (Sehgal, 2017). The absence of an enabling tax and fiscal environment remains a significant inhibitor to formalisation.
- Measured 65 years after India's independence, official figures accounted for 7 million artisans (GOI, 2021). Unofficial figures indicate over 200 million people (Dasra, 2013) depend on craft for their livelihoods. "We know for a fact that 60 per cent of the population in Kashmir currently practises craft. Either you're making it or you're part of the ancillary industry or you're marketing it. But there's no data," says Shruti Jagota of Commitment to Kashmir (CtoK)³.
- Women's skills remain unrecognised and unpaid in the informal economy even though they perform crucial functions in the production cycle. It continues to be viewed as an 'activity' without opportunity cost (Kremer & Chen, 1999; Basole, 2012).



2. <https://www.ctok.org.in/blank-page-5>

3

Reimagining the craft economy post Covid-19 report (2021)

https://issuu.com/fashionrevolution/docs/reimagining_the_craft_economy_post_covid-19_report/64

Key insights from the report

- The pandemic and lockdowns forced the most vulnerable artisans to choose between safeguarding lives or livelihoods. It triggered mass exodus of artisans from cities to the villages, and 22 per cent of the sector lost 75 percent of their annual income.
- According to the survey of 50 craft organisations and artisans, 44 per cent faced cancellation of orders by the buyers and delay in payments, 58 per cent made new products during the pandemic, and 76 per cent shared that their work was negatively impacted due to the pandemic.
- Craft organisations adapted to new realities and pivoted to digital platforms, introduced new products according to changed consumer behaviour and switched to the Direct to Consumer (D2C) business model.



Creative economy and culture sector – market size

Objective, scope and approach

Research Objectives

- To estimate the market size of the creative economy and culture sector in India
- The subsectors that have been considered are – Performing arts, design industry, festival market, handicraft, handloom, visual arts, publishing, crafts, heritage monuments and museums, advertisement, films and video, television and radio and online gaming

Study Scope

- **Geography** – India

Approach

- **Primary Research** – Conducted expert consultations from various industries (listed above) to gather quantitative & qualitative data and to understand the overall impact of COVID-19 on each sub category
- **Secondary Research** – Conducted focused secondary research across a range of sources including past studies on the subject, research papers, journals, and newspapers to validate findings and fill data and information gaps; also used various proxies and assumptions, wherever required to plug in the data gap

Limitations

- Since limited literature (with regards to market size) is available on the sector, this exercise was done on a best-effort basis
- We have relied mostly on reports from globally accredited sources (such as KPMG and EY) and news articles, wherever government reports were not available
- Few sub-categories (especially festivals, visual arts, and performing arts sector) falls under the unorganized sector and are a part of the informal sector of the economy, hence not reported anywhere
- We have relied mostly on expert views, proxies and credible sources (where available) to decipher the market sizes of these sub-categories
- In absence of any information on the secondary domain, the festival market has been completely estimated based on expert interviews
- TSC believes that this sector, along with visual arts and performing arts sectors requires detailed analysis to give the correct representation of the market – hence we would recommend further scoping

Market Size Performing Arts

Total Market – Creative Economy and Culture Sector

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|----------------------------------|------|------|------|----------|----------|
| Total Market (INR Crore) | - | - | - | 4,99,913 | 3,04,499 |
| Total Market (\$ billion) | | | | 71 | 41 |
| Y-O-Y % (INR) | - | - | - | - | -39.1% |

| | | 2018 | 2019 | 2020 |
|-------------------|------------------|--------|--------|--------|
| Conversion | 1Crore/1 billion | 0.01 | 0.01 | 0.01 |
| | INR/\$ | 0.0146 | 0.0142 | 0.0135 |

Contribution to the GDP

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|------|------|------|----------|----------|
| Total Market (INR Crore) | - | - | - | 4,99,913 | 3,04,499 |
| Total Market (\$ billion) | | | | 71 | 41 |
| Y-O-Y % (INR) | - | - | - | - | -39.1% |
| – Average \$ to INR conversion rate for a year is considered | | | | | |

Sources

https://www.imf.org/en/Publications/WEO/weo-database/2021/April/weo-report?c=534,&s=NGDP_R,NGDP_RPCH,NGDP,NGDPD,PPPGDP,NGDP_D,NGDPRPC,NGDPRPPPC,NGDPPC,NGDPDPC,PPPPC,&s=2019&ey=2026&ssm=0&scsm=1&sc=0&ssd=1&ssc=0&sic=0&sor t=country&ds=.&br=1

Performing Arts

Definition/scope

- Includes the revenue of live events from “organized” events and activation agencies (agencies that connect public with a brand and involve in design, manage, and produce the products/events and strategies); includes events organized by event companies across various industry sectors such as FMCG, Automotive, Government, and Financial

The scope does not include:

- Value generated from unorganized events companies and pure MICE (meetings, incentives, conferencing and exhibitions) and travel companies
- Value of media spends on and telecast rights of events (unless event IP was owned by an events and activation management company)
- Value of meetings, incentives, conferencing and exhibitions conducted by pure travel companies
- Value of IPs not owned by event companies
- Value of properties managed by inhouse activation teams of advertisers, print, radio and other M&E segments
- Weddings and other events which are largely in the unorganized segment

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|------|------|------|-------|-------|-----------------|
| INR Crore | | - | - | 8,300 | 2,700 | -67.5% |

Sources

https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

Proxy/assumption

- Directly sourced from EY report on "M&E Sector 2020"
- Methodology: This section is based on the findings of primary research conducted across more than 19 Indian events companies, 33 marketers and industry discussions conducted in January 2021
- Survey respondents felt that around half (or even more) the Indian events and activation segment was unorganized

Design Industry

Definition/Scope

- Includes Graphic designs, industrial design, animation designers, interior designers, fashion designers, UI/UX designers

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|--------|--------|--------|--------|--------|-----------------|
| INR Crore | 11,681 | 14,601 | 18,252 | 22,814 | 18,832 | -17.5% |

Sources

<https://www.indiatoday.in/pti-feed/story/indian-design-industry-may-grow-to-rs-18800-cr-by-2020-cii-658547-2016-12-05>

<https://startuptalky.com/design-industry-india-future/>

Proxy/assumption

- Calculated 2017–2019 values based on CAGR (2016–20), which is 25 per cent

Handicraft

Definition/Scope

- Includes art and metal ware, wood wares, hand printed textiles & scarves, embroider & crocheted goods, shawls, zari & zari goods, imitation jewellery, agarbatties & attars, carpet and other floor coverings

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|------|------|--------|--------|--------|-----------------|
| INR Crore | - | - | 72,971 | 71,960 | 44,326 | |
| | | | | | -38.4% | |

Sources

<https://epch.in/policies/exportsofhandicrafts.htm>

https://niti.gov.in/planningcommission.gov.in/docs/plans/stateplan/upsdr/vol-2/Chap_b4.pdf

Proxy/assumption

- Explained in the separate Handicraft tab

Handloom

Definition/Scope

- Fabrics such as sarees of Handloom, Real Madras Handkerchief, dhoti, casement, sheeting, lungis, terry towelling, woven fabrics
- Clothing accessories such as scarves of silk, gloves and mitters
- Madeups that includes bed linen, table linen, toilet and kitchen linen, bed sheets and bed covers, napkins, pillow cases, cushion covers, floor cloths, other furnishing articles of wool and silk

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|------|------|------|--------|--------|-----------------|
| INR Crore | | | | 18,396 | 10,462 | -43.1% |

Sources

<http://handlooms.nic.in/writer eaddata/2380.pdf>

<https://www.thehindubusinessline.com/opinion/crisis-looming-in-handloom-sector/article34304248.ece>

<http://handlooms.nic.in/writer eaddata/2381.pdf>

Proxy/assumption

- Explained in the separate Handloom tab

Visual Arts

Definition/Scope

- Includes revenue from art galleries and auction houses such as Vadehra Art Gallery, DAG Modern and SaffromArt; revenue is derived from various physical forms of art, including paintings, sculptures and miniatures
- While there are a number of noted art galleries and auction houses that account for a majority of formal art sales in India, there exist informal category with numerous art dealers and galleries across the country whose sales are not accounted for; hence sales data from the aforesaid dealers lacks transparency

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|-------|-------|-------|-------|-------|-----------------|
| INR Crore | 1,560 | 1,460 | 1,506 | 1,480 | 2,961 | 100% |
| Y-O-Y % | -1.9% | -6.4% | -3.2% | -1.7% | 100% | |

Sources

<https://ficci.in/spdocument/22945/Visual-arts-industry-in-India.pdf>

<https://www.newindianexpress.com/business/2021/apr/25/covid-lockdown-a-blessing-in-disguise-for-art-market-2294356.html>

<https://gjepe.org/solitaire/indians-are-increasingly-looking-at-auctions-to-purchase-jewellery/>

<https://www.telegraphindia.com/india/a-september-to-remember-for-indian-art-at-auctions/cid/1794420>

<https://economictimes.indiatimes.com/wealth/personal-finance-news/booming-art-biz-upsets-serious-artists/articleshow/863599.cms?from=mdr>

<https://unique-news.info/gaitonde-breaks-indian-art-auction-record-again-but-amrita-sher-gil-painting-falls-flat-in-south-asian-sales.html>

Proxy/assumption

- Sourced 2016 and 2017 figures from FICCI and KPMG report
- Calculated 2018 and 2019 values on the basis of average growth rate of last three years
- For 2020, the number has been estimated by taking the average growth rate of few auction houses

Festivals

- Includes revenue (overall economic impact) generated from hotel, F&B, delegates, sponsorships, rental, transport and miscellaneous expenses incurred by the festival goers
- This section only includes economic impact generated by independent festivals and religious festivals and does not take account account government festivals

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|------|------|------|----------|--------|-----------------|
| INR Crore | | | | 1,66,423 | 49,927 | -70.0% |
| Y-O-Y % | | | | | | |

Sources

<https://www.news18.com/news/india/goa-earned-rs-250-cr-ore-from-sunburn-says-tourism-minister-amid-drug-row-2440683.html>

<https://www.eventfaqs.com/news/ef-13292/sunburn-10-generates-inr-250-cr-business-for-pune-economy-reveals-percept>

https://www2.deloitte.com/content/dam/Deloitte/in/Documents/technology-media-telecommunications/IMI%20report_singlePage.pdf

Proxy/assumption

- Explained in the separate Festival Tab

Publishing

Definition/Scope

- Includes fiction, non-fiction and educational books
- Includes all format such as e-books, audiobooks and printed books (offline)

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|------|------|------|--------|--------|-----------------|
| INR Crore | | | | 50,000 | 30,000 | -40.0% |

Sources

<https://www.educationworld.in/ey-parthenon-report-on-indian-publishing-industry-shaping-future-of-india/>

<https://www.hindustantimes.com/cities/a-textbook-problem-schools-shut-publishers-count-losses/story-V09iDKNu110Eq1v0LtG63l.html>

<https://www.frontlist.in/>

https://www.internationalpublishers.org/images/aa-content/news/news-2020/Post-Covid_Action_Plan_Report.pdf

<https://www.thehindubusinessline.com/blink/cover/publishing-gets-digital-push-during-the-pandemic/article34549999.ece>

<https://scroll.in/article/978968/as-book-publishing-shrinks-during-the-pandemic-how-are-indias-printing-presses-coping>

Proxy/assumption

- Sourced 2019 figure from the report of Association of Publishers in India and EY-Parthenon on Indian publishing market
- For 2020, leveraged various articles and expert consultations to see the impact of COVID-19 on the industry, which is an average loss of ~40 per cent
- Though the pandemic has quickened the adoption of eBooks, audiobooks, and online retail; but digital contributes to only 8–10 per cent of the publishing market; hence the growth in digital platforms during pandemic is insignificant

Heritage and Public Monuments

Definition/Scope

- Includes revenue generated from tickets of Centrally Protected Monuments/ Sites and Museums

| | 2016 | 2017 | 2018 | 2019 | 2020 | CAGR (2017-20) |
|------------------|------|------|------|------|------|----------------|
| INR Crore | 223 | 248 | 317 | 379 | 91 | -76.0% |
| Y-O-Y % | - | 11% | 28% | 19% | -76% | |

Sources

<https://www.niti.gov.in/>

<https://www.businessworld.in/>

Proxy/assumption

- 2019 market has been calculated by taking average growth of last two years
- 2020 market has been calculated by considering the impact of COVID-19 on the footfall of Taj Mahal (which declined by 76 per cent) and hence used that per cent in overall revenue as a proxy in unavailability of information on any other monument

Advertisement Market

Definition/Scope

- Filmed entertainment revenue includes revenues from Domestic theatricals, Overseas theatricals, Broadcast rights and Digital / OTT rights
- Filmed entertainment segment does not include any revenues from food and beverage operations, parking revenues, retail revenues or any ticketing charges billed by online booking portals. Film gross box office is considered at end customer price, for both domestic and international theatricals, the latter being impacted by exchange rate fluctuations
- Videos include online audio, news, social media and OTT platforms

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|------------------|------|------|------|--------|--------|-----------------|
| INR Crore | - | - | | 67,700 | 70,100 | -3.5% |

Sources

<https://assets.kpmg/content/dam/kpmg/in/pdf/2020/09/synopsis-kpmg-india-media-and-entertainment-2020.pdf>
<http://www.e4media.net/mailer2018/dentsu-e4m-DigitalAdvertisingReport2021.pdf>

Proxy/assumption

- Directly sourced from KPMG report

Film and Video

Definition/Scope

- Includes advertisement revenues generated from digital and OTT, out-of-home, TV, print, films (in-cinema ads), and print; excluding radio revenue

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|-------------------------------------|-------|------|------|--------|--------|-----------------|
| Films (INR Crore) | - | - | | 18,330 | 7,030 | -61.6% |
| Videos (INR Crore) | - | - | - | 8,230 | 10,370 | -26.0% |
| Video Market (2020–25) CAGR% | -3.5% | | | | | |
| Total | - | - | - | 26,560 | 17,400 | -34.5% |

Sources

https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020
<https://www.moneycontrol.com/news/business/indias-overall-online-video-market-to-grow-at-26-cagr-to-reach-4-5-billion-by-2025-report-6331211.html>
<https://www.exchange4media.com/digital-news/indias-online-video-industry-made-1-4-bn-in-revenue-in-2020-mpa-110214.html>

Proxy/assumption

- Films market is directly sourced from EY report 2020
- Video market is directly sourced from "Media Partners Asia report", back traced 2020 number from 2025 market value and CAGR (2020-2025)

Television and Radio

Definition/Scope

- Includes all public service, commercial, cable and satellite TV and radio, including the production and broadcasting of programmes; television sub segment only
- Include revenue generated from subscription only as the advertisement revenue is already included in the advertisement sub category

- Radio segment includes revenue generated from Advertisement
- Animation, VFX and post production revenues include those earned from domestic and export services by companies in India and are correlated to averages across the content value chain

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|--------------------------------------|------|------|------|--------|--------|-----------------|
| Television (INR Crore) | - | - | - | 46,800 | 43,400 | -7.3% |
| Animation and VFX (INR Crore) | - | - | - | 9,500 | 5,300 | -44.2% |
| Radio (INR Crore) | - | - | - | 3,100 | 1,400 | -54.8% |
| Total | | | | 59,400 | 50,100 | -315.7% |

Sources

https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

Proxy/assumption

- Directly sourced from KY report

Online Gaming

Definition/Scope

- Including video games (captures only online gaming and no other forms of gaming)

| | 2016 | 2017 | 2018 | 2019 | 2020 | Y-o-Y (2019/20) |
|----------------------------------|------|------|------|-------|-------|-----------------|
| Online gaming (INR Crore) | - | - | | 6,500 | 7,600 | 16.9% |

Sources

https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

Proxy/assumption

- Directly sourced from EY report

- We have not included Public & Street Art; this market majorly falls into unorganized art section, hence not reported
- We have not included Architecture, Libraries (in the venue category) and Photography (in the visual art segment) due to the unavailability of data in the secondary domain

Festivals Market

| | 2019 | 2020) |
|---|----------|--------|
| Total Economic Impact of Independent festivals In India (INR Crore) | 1,66,423 | 49,927 |

Sources

https://www.voanews.com/a/south-central-asia_indias-festive-season-poses-fresh-risk-pandemic-crosses-peak/6197454.html

- The size of festival market is on the best effort basis and is entirely based on the expert interviews
- For 2020 figure, we have used 70 per cent decline figure on 2019 data – sourced majorly primary consultations; the impact of COVID on each subsector is not well documented in terms of growth/decline, hence we had to rely on the limited sources and primary interviews
- Most experts denied to comment on this approach and had limited visibility, especially with regards to market size; Divya Bhatia (festival director - jodhpur riff) believes that we need to categorize the subcategories differently
- TSC believes that this section requires detailed analysis (similar to the approach followed for the Durga Puja market size) to give the correct representation of the market – hence we would recommend further scoping

Religious festivals

| | | 2019 |
|--|---|----------|
| Considered major festivals; Durga Puja, Ganesh Chaturthi, Diwali, Eid and Onam | Average Economic Impact generated by one religious festival (INR Crore) | 32377 |
| | Approximate number of total such festivals in the country | 5 |
| | Total Economic Impact (INR Crore) | 1,61,885 |

Sourced from Durga Pooja study conducted by TSC in November 2020

The subsectors that have been considered are – Installation & Decoration, Idol Making, Lighting & Illumination, Advertisements, Sponsorships, Films & Entertainment, Crafts & Design, Retail, and Food & Beverage

Independent festivals

| Large-scale Festivals | | 2019 |
|--|---|------|
| The likes of Jaipur Literature Festival, Sunburn and Hh7 | Average Economic Impact generated by a large scale festival (INR Crore) | 115 |
| | Approximate number of total such festivals in the country | 3 |
| | Total Economic Impact (INR Crore) | 345 |

| Medium-scale Festivals | | 2019 |
|---|---|-------|
| The likes of Mahindra Kabira in Varanasi, Literature festival such as Tata and some of visual art festivals | Average number of delegates visit in such festivals | 115 |
| | Rate of package (INR Lakhs) | 1.5 |
| | Revenue earned from delegates (INR Lakhs) | 225 |
| | % of revenue earned from sales of package | 40% |
| | Average economic impact generated by one medium festivals (INR Lakhs) | 562.5 |
| | Approximate number of total medium festivals in the country | 100 |
| | Total Economic Impact (INR Crore) | 563 |

| Small-scale Festivals | | 2019 |
|---|--|-------|
| The likes of craft melas, North East festival, Jazz festivals in Goa and Gurgaon, Haats and Australia Day | Average economic impact generated by one small festivals (INR Lakhs) | 70 |
| | Approximate number of total small festivals in the country | 3,000 |
| | Total Economic Impact (INR Crore) | 2,100 |

| Commercial/Cultural Events/Festivals | | 2019 |
|---|---|-------|
| The likes of Arangnetram/ Chennai Season and Sabhas | Average Number of Events/ Performances | 1,000 |
| | Revenue generated from each event (INR Lakhs) | 25 |
| | Total Economic Impact (INR Crore) | 250 |

| Others | | 2019 |
|--|--|-------|
| Music based events whose revenue is generated in India | Average Number of Events/ Performances | 1,280 |

All the insights from Independent festivals have been gathered from expert consultations and KIIs

Source

https://www2.deloitte.com/content/dam/Deloitte/in/Documents/technology-media-telecommunications/IMI%20report_singlePage.pdf

Handicraft market

| Total Handicraft market in India (Domestic + Export) | 2018 | 2019 | 2020) |
|--|----------|----------|----------|
| INR Crore | 72,971.0 | 71,960.4 | 44,325.5 |

- The handicraft market includes export and domestic market of handicrafts including carpets and other floor coverings
- The export numbers have been sourced from Export Promotion Council for Handicrafts, Indian Trade Portal and Carpet Export Promotion Council while the domestic consumption has been estimated through export per cent sourced from Niti Ayog report and Indian Trade Portal
- For handicrafts, in absence of any other data sources, we have assumed export per cent for 2004 same in for 2018 and 2019 and 2020 data has been estimated/triangulated by incorporation the decline (per cent) witnessed in the market, sourced from news article and various expert interviews

| Handicraft Export (INR Crore) | | | | |
|---------------------------------|----------|----------|-------------------------|-------------|
| | 2018 | 2019 | 2020 (provisional data) | % of Export |
| Art Metal ware | 3,472.5 | 3,457.5 | | 70% |
| Wood wares | 5,311.6 | 5,494.9 | | 20% |
| Hand printed Textiles & Scarves | 3,305.1 | 2,543.1 | | 50% |
| Embroidered & Crocheted goods | 3,786.6 | 4,206.4 | | 70% |
| Shawls as art ware | 4.7 | 2.2 | | 25% |
| Zari & Zari goods | 133.9 | 121.4 | | 15% |
| Imitation Jewellery | 1,795.0 | 1,582.4 | | 50% |
| Agarbatties& Attars | 985.3 | 1,106.3 | | 50% |
| Misc. Handicrafts | 6,754.4 | 6,756.1 | | 90% |
| Total | 25,549.0 | 25,270.1 | 12,635.1 | |
| Y-o-Y % | | -1.1% | | |

| Total Handicraft (INR Crore) | | |
|------------------------------|----------|----------|
| 2018 | 2019 | 2020 |
| 4,960.7 | 4,939.3 | - |
| 26,558.0 | 27,474.3 | - |
| 6,610.2 | 5,086.2 | - |
| 5,409.4 | 6,009.1 | - |
| 18.6 | 8.8 | - |
| 892.9 | 809.4 | - |
| 3,589.9 | 3,164.7 | - |
| 1,970.6 | 2,212.6 | - |
| 7,504.8 | 7,506.7 | - |
| 57,515.2 | 57,211.1 | 28,605.5 |

Source – Handicraft export for 2018 and 2019

<https://www.usabusiness.co.in/export-handicrafts-from-india/>

Sources

<https://tradingeconomics.com/india/exports/carpets-textile-floor-coverings>

<https://www.thehindubusinessline.com/economy/handicraft-exports-may-fall-40-this-fiscal-due-to-covid-19/article31954337.ece>

https://niti.gov.in/planningcommission.gov.in/docs/plans/stateplan/upsdr/vol-2/Chap_b4.pdf

<https://www.epch.in/electionofcoa/2020annualreport.pdf>

<https://www.thehindu.com/news/cities/bangalore/handicraft-exhibitions-make-a-comeback-after-a-years-gap/article33905674.ece>

| Carpet & other Floor Coverings Export (INR Crore) | | | | |
|---|----------|----------|----------|-------------|
| | 2018 | 2019 | 2020 | % of Export |
| Total | 12,364.7 | 11,799.5 | 12,576.0 | 80% |

| Total Carpets & other Floor Coverings (INR Crore) | | |
|---|----------|----------|
| 2018 | 2019 | 2020 |
| 15,455.9 | 14,749.3 | 15,720.0 |

Sources

<https://tradingeconomics.com/india/exports/carpets-textile-floor-coverings>

http://cepc.co.in/wp-content/uploads/2020/11/CEPC_AR_2019-20_910-corr-P-aa.pdf

<https://www.indiantradeportal.in/index.jsp>

Handloom market

| Total Handloom market in India (Domestic + Export) | | |
|--|----------|----------|
| | 2019 | 2020 |
| INR Crore | 18,396.3 | 10,462.3 |

- The handloom market includes export and domestic market of handloom
- The export numbers have been sourced from Development Commissioner Handloom, Ministry of Textiles report while the domestic consumption has been estimated through Business Article, which has sourced data from Handloom Census (2019–20)

- The article says that the export market across most of the product categories has been stagnant over the last few years, hence considered same for both the years

| Handloom Export (INR Crore) | | | |
|-----------------------------|---------|--------|------|
| | 2019 | 2019 | 2020 |
| INR Crore | 1,471.7 | 836.98 | 8% |
| Y-o-Y % | | -43.1% | |

Sources

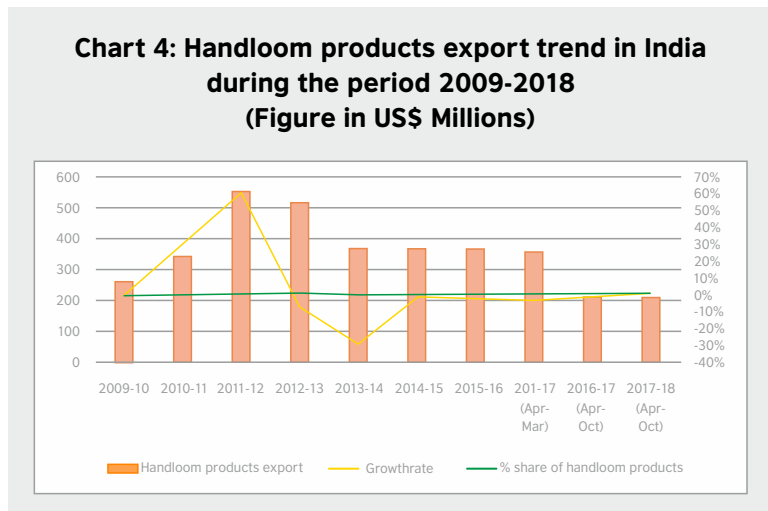
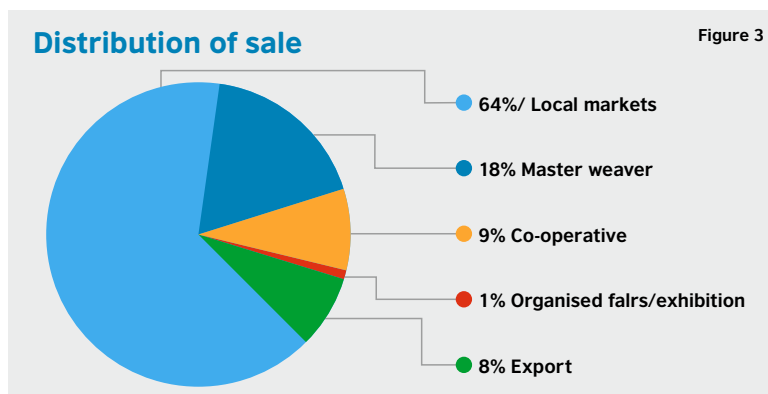
- http://handlooms.nic.in/writer_eaddata/2380.pdf
- http://handlooms.nic.in/writer_eaddata/2381.pdf
- <https://www.thehindubusinessline.com/opinion/crisis-looming-in-handloom-sector/article34304248.ece>
- <https://timesofindia.indiatimes.com/india/piyush-goyal-calls-for-increasing-handloom-exports-to-rs-10000-crore-in-three-years/articleshow/85126821.cms>

- We have taken out carpets and other floor covering export figures from the total figures as it is covered in the handicraft section

Supporting sources that says that India's handloom export is low

Sources

- <https://www.thehindubusinessline.com/opinion/how-the-handloom-sector-can-be-revived/article35882724.ece>
- <https://www.ijitee.org/wp-content/uploads/papers/v8i6s4/F11330486S419.pdf>



Publishing Market

Trade books (fiction + non-fiction) constitutes to less than 10 per cent of the total publishing market

Total publishing market (including education and trade books)

| | 2019 | 2020 | Y-o-Y (2019/20) |
|--|--------|--------|-----------------|
| | 50,000 | 30,000 | -40% |

Publishing (only Trade Books) INR Crore

Sources

<https://www.educationworld.in/ey-parthenon-report-on-indian-publishing-industry-shaping-future-of-india/>

Publishing market (only trade books)

| | 2019 | 2020 | Y-o-Y (2019/20) |
|-------------------------------------|-------|-------|-----------------|
| Total Publishing Market (INR Crore) | 4,000 | 2,400 | -40% |

Sources to substantiate why we have considered 40 per cent as the overall loss due to COVID

| | Y-o-Y (2019/20) |
|--------------------------------------|-----------------|
| International Publishers Association | 40% |

Sources

https://www.internationalpublishers.org/images/aa-content/news/news-2020/Post-Covid_Action_Plan_Report.pdf

Commentaries

Impact of COVID-19 on the global publishing industry

Member views on market outlooks and recovery across global publishing markets

| | 2019 | 2020 |
|-------------------------------------|------|--------|
| Total Publishing Market (INR Crore) | 18 | 10 |
| Y-O-Y% | | -44.4% |

Sources

<https://www.thehindubusinessline.com/news/with-800-stalls-chennai-book-fair-expects-footfall-to-exceed-15-lakh/article30588526.ece>

<https://www.thehindubusinessline.com/news/with-800-stalls-chennai-book-fair-expects-footfall-to-exceed-15-lakh/article30588526.ece>

Commentaries

Taken an average (In 2020, the fair generated an income of Rs 8 to Rs 12 crore this year)

| | 2019/20 (Y-O-Y %) |
|----------------------------|-------------------|
| | 70% |
| Educational books (Y-o-Y%) | 50% |
| | 50% |

Sources

<https://www.hindustantimes.com/cities/a-textbook-problem-schools-shut-publishers-count-losses/story-V09iDKNu110Eq1vOLtG63l.html>

Commentaries

“These days, only a few parents come to buy books for their children. My sales have plummeted by 70 per cent this year,

Textbook publishing in India has taken a grim turn with sales of many well-known publishers dropping as much as 50 per cent compared to last year.

“Our sales have plummeted 50 per cent this academic session,” says Ashwani Goyal, managing director, Goyal Publishers, one of the country’s largest publishers of language learning books.

| | 2019/20 (Y-O-Y %) |
|--------------------------------------|-------------------|
| Founder of Labyrinth Literary Agency | 40% |

Sources

<https://www.thehindubusinessline.com/news/variety/how-the-book-industry-is-grappling-with-the-coronavirus-induced-lockdown/article31471466.ece>

Commentaries

The publishing industry can be privy to a 30-50 per cent decline in print revenue, said Anish Chandy, founder of Delhi-based Labyrinth Literary Agency,

| | 2019/20 (Y-O-Y %) |
|----------------------------|-------------------|
| Educational books (Y-o-Y%) | 40-45% |

Sources

<https://scroll.in/article/978968/as-book-publishing-shrinks-during-the-pandemic-how-are-indias-printing-presses-coping>

Commentaries

The demand for educational books in Ludhiana, for instance, has dropped by 40-45 per cent.

The magazine’s assessment: even in a best-case scenario, commercial print firms are operating at 55-66 per cent of the pre-Covid-19 capacity.



Additional Insights

Performing Arts

The performing art sector (only for organized sector) declined by 67 per cent in 2020; Some qualitative insights derived from the Live events (organized and un-organized both) sector include:

- Live events, were perhaps, the **hardest hit of all the sectors**, despite numerous attempts to digitalize its offerings, not even a small fraction of revenues were recovered through that medium – **the segment will continue to remain impacted for the first two quarters of 2021 before marketers and audiences feel comfortable about participating in live events.**
- Most of the **artists (specially where there is no scope for online work** such as Lighting artists and Instrument maker) **are sitting idle since March 2020**, on the top of it, the second wave of COVID-19 has worsened the already miserable condition of artists in India
- Even though artists are turning to **online shows (with no monetary support, not even getting paid for their digital performance)** but the concept of online concerts are still at a nascent stage making survival difficult for many
- Third party reservation companies such as **BookMyShow is now curating stay-at-home experiences and looking to work out some sort of a financial model for itself and the performers** it features. Its new offering, BookMyShow Online, is entirely dedicated to hosting and facilitating music, comedy, and entertainment events. Also, It has collaborated with entertainment company Live Nation, Vodafone, NCPA, Big Bad Wolf Entertainment, among others to livestream music, theatre, stand-up comedy, fitness sessions
- The industry overall **lacks cultural policy, government support and collaboration**; also, there should be no tax breaks or subsidies for artists and craftsmen; **Ministry of Culture has done nothing to compensate/motivate smaller artists**, who are finding it difficult to survive post-COVID

Sources

Mostly through Expert Interviews

<https://www.thehindu.com/society/the-indian-modern-and-contemporary-art-market-is-flourishing-even-during-the-pandemic/article32811528.ece>

Handicrafts

- Overall the craft market (including carpets) witnessed ~38 per cent decline in 2020; out of which craft sector alone saw a ~50 per cent decline in 2020 (sourced from expert interviews and news articles)
- The production of handicrafts is (after agriculture) the largest source of income among rural populations
- Since the lockdown, production of handicrafts stopped completely and huge unsold inventory piled up; the industry have no capital to reinvest as artisans saw no sale either through exhibitions or through orders;

- “Kalyan Jana, who makes hand-crafted mats in West Bengal, employs over 200 families. “Last year, I couldn’t hire them. We could neither find raw materials nor places to sell the mats. We usually make ₹25 lakh a year. In 2020, we made less than half of that,”

Sources

<https://www.businesstoday.in/opinion/columns/story/covid19-impact-on-handicrafts-sector-handloom-artisans-suffering-due-to-coronavirus-lockdown-270592-2020-08-20>

<https://aepecindia.com/system/files/Annual%20T%20and%20A%20Industry%20Report-2021.pdf>

<https://www.thehindu.com/news/cities/bangalore/handicraft-exhibitions-make-a-comeback-after-a-years-gap/article33905674.ece>

Visual Arts Market

- While other creative sectors faced the heat of COVID-19, **the lockdown considered to be a blessing in disguise for the visual art market**
- Galleries such as Saffronart, Pundoles and others have seen collectors pay unprecedented prices for works

“Production of artworks was initially limited. But now artists are working on paintings in small volume. Auctions on the other are a whole other matter. Many world records were broken between September 2020 to April 2021 and April 2021 having seen auction sales of Rs 260 crore. The sales are good because a lot of people have made money in business and also lots of people have pulled out from alternate investments and placed them in art which is more secure.” – Ashvin Rajagopalan, Director of the Piramal Foundation of Art

Sources

<https://www.newindianexpress.com/business/2021/apr/25/covid-lockdown-a-blessing-in-disguise>

<https://www.firstpost.com/art-and-culture/a-year-since-indias-covid-19-lockdown-an-overview-of-how-artists-and-cultural-institutions-navigated-a-crisis-9458211.html>

Publishing

- According to the India Book Market Report (2016), **India is the sixth largest publisher in the world overall, and the second largest publisher in the world for English-language books**; however the industry face challenges (Pre-COVID) such as **State apathy, sales-driven editorial strategy, and lack of accurate data**
- The publishing industry was badly hit as the entire value chain had zero sales for almost three months in 2020; physical books still constitute to around 85-90 per cent of the total sales
- The power of digital transformation was felt in publishing like in other industries; industry learnt about the way readers will buy books in the future—formats, retail, genres and how often too

Sources

<https://lifestyle.livemint.com/how-to-lounge/books/how-india-s-publishing-industry-coped-with-the-pandemic-year-111609903670712.html>

<https://www.firstpost.com/living/a-closer-look-at-indian-publishing-unveils-a-state-apathetic-towards-books-education-knowledge-8123831.html>

https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

Museums, Heritage & Public Monuments

- From museums to historic places, **the footfall in 2020 was abysmal, affected revenue quite seriously**
- **Taj Mahal, saw <1 per cent of international tourists** amidst visa and international flight restrictions in 2020; in 2019, Taj Mahal earned INR 65 crores in revenue with >5 lakh foreign visitors
- To offset the losses, **monuments are planning to increase the ticket prices in 2021**; For example - The Indian tourists, currently paying INR 50 entry ticket for Taj, will now have to pay INR 80, while foreign tourists will have to shell out INR 1,200, instead of INR 1,100

Sources

https://www.business-standard.com/article/current-affairs/taj-mahal-ticket-prices-likely-to-increase-for-tourists-agra-admin-121031600089_1.html

Film and Video

- The filmed entertainment segment saw an 60 per cent decline across domestic and international theatrical revenues; ~ 441 films were released during 2020 vs. 1,833 releases in 2019 on account of lockdowns and social distancing norms announced due to COVID-19 pandemic
- The Bollywood has incurred huge revenue losses in 2020; industry experts believe **the loss is in the range of ~INR 5,000 Crore, even they are anticipating similar situation in 2021** as shootings are coming to a halt as the Maharashtra Government stopped all TV and film shoots, due to this many directors are also looking to shoot in a different city with less stringent regulations
- **"Just the exhibition sector has lost 1500 crore from March-end to mid-September.** The total figure across Bollywood is massive. You have to take the interest rates, salaries being paid, maintenance charges and so many other things into account. Add this to the people who have lost jobs and maybe more will lose even further. And then, we have no support from the government. It's a case of economic pandemic and not just medical pandemic. It's extremely scary and the government must step in, immediately. High taxes are paid by this industry and the employment created in our sector is huge. Entertainment sector needs to be viewed with priority." – **Akshaye Rathi, Exhibitor-distributor (September 2020)**
- The losses were slightly offset by movies released on OOT media; **OTT benefitted from the degrowth of cinemas, as some film studios choose to fast-track new releases to home video platforms**

Sources

<https://web-assets.bcg.com/2b/d6/90c369a34b229e5d7dce8da4706b/lights-camera-action-cii-report-2020.pdf>

https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

<https://timesofindia.indiatimes.com/entertainment/hindi/bollywood/news/figures-of-bollywoods-loss-till-date-due-to-covid-19-will-make-your-jaw-drop/articleshow/78101922.cms>

Television, Radio and VFX and Animation

- The Indian M&E sector fell by 24 per cent to INR1.38 trillion; Historically, M&E as a sector grown and often outperformed India's nominal GDP, the sector fell 3x times India's nominal GDP fall of 8 per cent due to the discretionary nature of the spend. Subscription revenues however proved their mettle by holding up better than advertising revenues
- Television subscription **declined by 7 per cent in 2020, driven by the continued growth of free television, reverse migration and a reduction in ARPUs due to part implementation of NTO 2.0** (New Tariff Order, provides freedom to stakeholders to price their services while ensuring freedom to choose channel to customers)
- **Radio revenues declined due to overall slowdown and lower central government advertisement;** also both ad rate and volume drops as **key advertiser segments (regional and retail) were unable to run their businesses at their usual scale**

Sources

<https://bestmediainfo.com/2021/04/industry-fears-revenue-losses-with-shootings-coming-to-a-halt-hopes-for-shoots-to-be-allowed-again-soon/>

Gaming Market

- Online gaming grew 17 per cent in 2020 (the fastest growing segment of the M&E sector for the fourth year in a row) driven by work from home, school from home and increased trial of online multi-player games during the lockdown
- Gaming and esports **players are increasingly experimenting with cloud, virtual reality (VR) and mixed reality (MR)**
- As of 2020, it is estimated that **there are over 400 gaming start-ups in India and 5,527 (or 3 per cent of all) game publishers on Google Play are from India**
- The sector is expected to continue to grow and reach 500 million gamers by 2025 – to become the third largest segment of the Indian M&E sector

Sources

https://www.ey.com/en_in/media-entertainment/playing-by-new-rules-media-and-entertainment-industry-trends-2020

<https://assets.kpmg/content/dam/kpmg/in/pdf/2020/09/synopsis-kpmg-india-media-and-entertainment-2020.pdf>

Advertisement Market

- Amid COVID-19, Ad spend took hit, saw Increase in number of advertisers across sectors post October 2020 (as compared to pre-COVID) – **COVID accelerated shift to digital, the share of digital advertisement is expected to grow to 15 per cent almost 2 years ahead of earlier projections**
- **The recovery was led by increase in number of advertisers and entry of new-to-TV advertisers** (such as White Hat Jr Technologies and Practo).

Sources

<https://web-assets.bcg.com/2b/d6/90c369a34b229e5d7dce8da4706b/lights-camera-action-cii-report-2020.pdf>

Employment and Other Information

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|------------------------|------------|----------|---------------------------|--|---|
| | Formal | Informal | Total (Formal + informal) | | |
| Performing Arts | NA | NA | NA | The peak season is from October to March | Fine artists: INR 4,94,348 per annum |

Sources: Expert Interviews

https://www.payscale.com/research/IN/Job=Fine_Artist%2C_Including_Painter%2C_Sculptor%2C_or_Illustrator/Salary

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|------------------------|------------|----------|---------------------------|-------------|---|
| | Formal | Informal | Total (Formal + informal) | | |
| Design Industry | - | - | 1.5 million | NA | Graphic Designer: INR 3,47,800–8,50,000 per annum Animation Designer: INR 8,000–40,000 per annum Interior Design: INR 4,00,000–30,00,000 per annum Fashion Design: INR 15,000–40,000 per annum (starting salary) UI/UX Designer: INR 6,95,863–10,00,000 per annum |

Sources

<https://www.jagranjosh.com/articles/creative-economy-shaping-the-future-of-design-1576580107-1>

<https://startuptalky.com/design-industry-india-future/>

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|-------------------|------------|----------|---------------------------|-------------|---|
| | Formal | Informal | Total (Formal + informal) | | |
| Handicraft | | | 7 million | NA | |

Sources

<https://www.jagranjosh.com/articles/creative-economy-shaping-the-future-of-design-1576580107-1>

<https://startuptalky.com/design-industry-india-future/>

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|-----------------|------------|----------|---------------------------|---|---|
| | Formal | Informal | Total (Formal + informal) | | |
| Handloom | | | 35.22 lakh | For Handicrafts: The peak season is from December to March — with increased tourism activity, and fairs and exhibitions; however April to June is a dry season for this sector For Textiles: The Festive season (Sep to Nov) | Artisans 4,000–20,000 per month |

Sources

<https://pib.gov.in/PressReleasePage.aspx?PRID=1596372>

<https://mittalsouthasiainstitute.harvard.edu/handicraft-livelihood-creation-project/>

<https://www.vogue.in/fashion/content/how-the-crafts-economy-can-stay-resilient-during-the-covid-19-pandemic>

<https://www.ibef.org/industry/textiles.aspx>

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|--|------------|----------|---------------------------|-------------|---|
| | Formal | Informal | Total (Formal + informal) | | |

Visual Arts market

| | | | | | |
|----|----|----|----|----|----|
| NA | NA | NA | NA | NA | NA |
|----|----|----|----|----|----|

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|--|------------|----------|---------------------------|-------------|---|
| | Formal | Informal | Total (Formal + informal) | | |

Venues (Theme based parks)

| | | | | |
|--------|----|----|--|----|
| 80,000 | NA | NA | For amusement parks - the peak season is from April to June, where the industry earned 65-70 per cent of the revenue | NA |
|--------|----|----|--|----|

Sources

<https://thewire.in/business/india-theme-parks-amusement-rides-covid-19-new-normal>

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|--|------------|----------|---------------------------|-------------|---|
| | Formal | Informal | Total (Formal + informal) | | |

Publishing

| | | | | |
|------------------------|----|--|---|--|
| Newspaper: 1-2 million | NA | Newspaper: ~3 million Books: 9,000 publishers and >21,000 book retailers (2015) | Major book fairs in India are normally held between mid-Sep and mid-Feb, hence non-educational book sales will peak during this period While educational books (tied to school or college curriculum) will be in demand round the year | Copy Editor: INR 2,97,000 per annum Editor: INR 4,04,000 per annum Content Writer: INR 3,03,00 per annum Assistant Editor: INR 3,74,000 per annum |
|------------------------|----|--|---|--|

Sources

<https://www.ndtv.com/business/covid-19-impact-news-newspaper-industry-could-face-losses-of-up-to-rs-15-000-crore-industry-body-2221806>

<https://taxguru.in/finance/covid-19-impact-newspaper-industry.html>

<https://taxguru.in/finance/covid-19-impact-newspaper-industry.html>

<https://www.payscale.com/research/IN/Industry=Publishing/Salary>

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|--|------------|----------|---------------------------|-------------|---|
| | Formal | Informal | Total (Formal + informal) | | |

Museums, Heritage & Public Monuments

| | | | | |
|----|----|----|--|----|
| NA | NA | NA | For monuments like Taj Mahal - the peak season is from September to December where the industry earned 65-70 per cent of the revenue | NA |
|----|----|----|--|----|

Sources

<https://www.outlookindia.com/outlook-traveller/travelnews/story/71079/taj-mahal-got-less-than-1-of-international-visitors-in-2020>

| | Employment | | | Peak Season | Earnings (subjective to year of experience, education, and other factors) |
|--|------------|----------|---------------------------|-------------|---|
| | Formal | Informal | Total (Formal + informal) | | |

Film and Video

Television, Radio and VFX and Animation

Gaming software

Advertisement Market

Sources

<https://web-assets.bcg.com/2b/d6/90c369a34b229e5d7dce8da4706b/lights-camera-action-cii-report-2020.pdf>
https://image-src.bcg.com/Images/BCG-CII-ME-report-India-Creative-Economy-Dec-2017_tcm9-178821.pdf

Expert Interviews

<https://www.financialexpress.com/brandwagon/me-could-generate-8-million-jobs-by-2025/2070032/>

- - 4 million (approx. 60,000 alone in gaming industry)

All the year round
 Specific to Podcast industry (radio and video recording), companies receive maximum contracts during Q1 and Q4

NA



Festival connections: A visual overview

Graphical representations from key sessions held by the British Council and Art X Company



**Youth led festivals,
Sponsorship and Funding,
Access for all,
New Media Interpretation
and Innovation,
Audience Data,
Eco-friendly Festivals,
Food in the Arts**

#festivalsforfuture →

**7 Webinars
4 Interactive Meetings**

235 Attendees

**27 Speakers
6 Speakers from the UK**

**Simultaneous Sign
Language Interpretation**

#festivalsforfuture →

**Festival Organisers,
Industry Leaders,
Event Planners,
Students,
Artists,
Freelancers,
and more.**

**11 Festivals from
5 cities in 2 countries**

#festivalsforfuture →

Festival Partnerships
Serendipity Arts Festival
Ars Electronica

Festivals and organisations featured
Boomtown Festival, The Experience Co,
Waves BITS Goa, Thespo, Malhar,
Attitude is Everything, Access for ALL,
Harkat Studios, Studio Safdar, Quicksand,
The Audience Agency, TagBag, Paytm
Insider, A Greener Festival, Skrap, Echoes
of Earth, Revival 2020, Sundooq, The
Black Sheep Bistro, Visual Respiration,
and Shambala Festival.

#festivalsforfuture

