FESTIVALS FROM INDIA

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Festivals From India—Needs & Insights

A research study on the festivals sector landscape, needs and audience insights in India.

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For British Council India

Authors:

Dr. Aatreyee Ghosh, Dipti Rao, Kavya Iyer Ramalingam, Rashmi Dhanwani, Dr. Padmini Ray Murray at the **Art X Company**

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Note from the authors

This research report is generated by the Art X Company on behalf of the British Council and is presented in the form of a consolidated report containing the results based on interviews, focus groups and mapping. This version includes the executive summary and an excerpt of the final report that was generated for use in the development of the content and design of the portal www.festivalsfromindia.com

ACKNOWLEDGEMENTS

We thank the team at the British Council for their feedback and guidance provided during the course of this study. We would also like to extend our gratitude to the scores of cultural professionals from all over the country who agreed to participate in this study and share their experiences. Our research team was fortified by the thorough contributions of other members from the team including our data analyst Poorvaja Sivaraman, coordinator Mahima Grover, research interns Kunjika Pathak, Ananya Pujary, Adithya Ajith Nair, Shrushti Bhosale, Zephyr Hussain Pegu, Swati D and Akanksha Mete.

DISCLAIMER

1. Executive Summary

INTRODUCTION

Festivals From India – Needs Analysis & Audience Insights is a research study that aims to outline the needs of the festivals sector in India, how it understands and measures its audiences and how festival goers engage and interact with festivals in India.

The study has been commissioned by the British Council as part of its Festivals for the Future programme, which brings emerging and established festivals together to connect, create and collaborate on international projects, with the vision to strengthen the creative economies of India and the UK and enable sustainable capacity building in both countries. The study and its output would be utilised for the digital portal Festivals From India, which is supported by the British Council, and designed and developed by ArtBramha Consulting LLP. Festivals From India (www.festivalsfromindia.com) is the first-ever online platform that has been designed to showcase India's cultural festivals. The India-UK consortium is collaborating to promote cultural tourism, by attracting new audiences both online and offline.

Photo credit: Jaipur Literature Festival, 2016 by Sharma Photo Studio

METHODOLOGY

In cognisance of the multi-layered and complex nature of the study, the methodology consisted of:

a) Desk research that included literature review of festivals in India and the UK, and preliminary mapping of arts and culture festivals in India.

b) Review of existing secondary data primarily drawn from British Council's existing projects (Festival Connections and Taking the Temperature).

c) Primary research that included interviews, Focus Group Discussions (FGDs), and workshops.

d) Inferences drawn from data gathered for the purpose of building the portal Festivals From India (user research and user personas and segmentation).

- 700 festivals were mapped to outline the landscape and composition of arts and culture festivals in India, along with developing a contact database of festivals. Subsequently, an online data collection form designed to capture content of festivals was deployed.

- 11 interviews and FGDs comprising 12 participants, which included festival directors, curators, marketing personnel, outreach partners, artist managers, agents, creative professionals and production managers were carried out to tap into the diverse nature of the festival circuit.

- 8 workshops were conducted by The Audience Agency with the content, research and design teams of the festivalsfromindia.com portal, to delve into the motivations of the audience and the psychographic, behavioural, socio-economic and demographic aspects that affect audience behaviour and involvement with the sector.

- Net Bramha, the web development and design partner for this project, conducted a series of user research through interviews to gain a deeper understanding of motivations of festival professionals and audiences.

Photo credit: Jaipur Literature Festival by CN traveller

KEY INSIGHTS

For the purposes of the study, a “cultural festival” has been defined as,

“An organised series of arts and culture events or activities typically held annually in the same location, either physically or digitally. It is a period of celebration that focuses on either a single genre of artform or several, that is either curated and selected by a team or comprises a collection of arts initiatives, and brings together a range of people from different locations to form an audience.”

A cultural festival can vary in size from a gathering of hundreds to many thousands of individuals and is often supported by governments, organisations, brands, communities, collectives, and individuals. The space and context of arts festivals in India is large, and given our organisation’s resources and the research team’s expertise, we choose to focus on this niche. Festivals from the following genres have been identified: Arts and Crafts, Dance, Design, Film, Folk Arts, Food and Culinary Arts, Heritage, Literature, New Media, Photography, Music, Theatre, Visual Arts and interdisciplinary and/or multi-arts. This study does not take into consideration religious or faith-based festivals.

FESTIVALS IN INDIA

- Over the course of six months, from May till October 2021, almost 700 festivals were mapped in totality from different parts of the country and the process of mapping continues till date.

- Many of the festivals while popular locally, lacked national presence due to lack of media coverage or any form of publicity.

- Most festivals in India do not operate with a functional website. Instead they mostly reach their audience through social media platforms like Facebook, Instagram and others.

- Most of these festivals often struggle to reach out to a wider database of audience as well as sponsors due to lack of training as well as no institutional or governmental support.

- The COVID-19 pandemic transformed the festival scene overnight and its effect will continue to affect the way the festivals sector in India changes and adapts itself.

Photo credit: International Film Festival of India, by iffigoa.org

FESTIVALS: NEEDS ANALYSIS

Audience Data, Economics and Ticketing

- A major challenge to gauging audience needs is the lack of skills and resources with respect to data collection, analysis and usage. While there was a general consensus that audience data is important to glean strategic insights (such as deciding the ticket strategy, the kind of sponsorship needed, the associated programming and curation, etc.), respondents stated a specific skill gap – with respect to deriving inferences from existing audience data and put it to use towards audience development strategy.

- The most visible festivals in the country are privately funded, and attract and have the capability to host several thousand visitors in an edition. Several rely on sponsorships and corporate donors, in addition to initial investments by entities that expect financial returns. As a festival grows in size, the revenue earned from tickets forms an increasingly larger share of the financial health of the festival.

- Introduction of ticketing platforms like BookMyShow (1999) and Paytm Insider.in (2014) enabled significant changes in the way ticketing for cultural events and festivals is handled in India. The ticketing platforms also gave festivals access to audience data as big data, growth-centric ticketing strategies, and enhanced audience development approaches. Given the scale of operations and technology required to run festival ticketing, most commercial cultural festivals work through a ticketing platform. Through this technology-enabled revenue source, income from ticketing has become an integral part of the festivals sector and represents the move towards an organised and professional approach to the consumption of arts and culture.

- Government cultural festivals tend to represent the bulk of cultural showcase offerings in Tier 2 and Tier 3 cities and smaller towns and villages. These festivals straddle the socio-religious dimensions of culture, where the arts are a vehicle of celebration rather than a product for showcase.

Areas of Growth

- The areas of growth as identified by festival stakeholders were myriad. There was significant emphasis placed on community involvement and artist collaborations as key growth parameters. Growth in terms of scale of production, audience numbers, and outreach, while mentioned, were not as widely cited as prime areas of growth.

- Financial stability and sustainability, networking and collaborative practices were identified as other important areas of growth for festivals.

Training and Upskilling

- The need for sustainable, creative and reasonable technical and production capabilities, especially adapted to the Indian context was a much-cited demand. The lack of adequate skilled professionals in production and operations is most strongly felt by festival stakeholders when they host international artists and performers, whose needs they are not able to cater to.

- Respondents also stressed the need for skills in finance, budgeting, and garnering sponsorship and funding. Respondents highlighted a gap in the range of basic-to-advanced skills in areas of grant writing, pitching for funding, drafting and sending emails to sponsors, resource mobilisation, and planning and allocating budgets.

- With respect to business development, a deeper understanding of the nuanced relationship between marketing and "softer touch points like culture", was deemed important, as stated by the marketing lead of a festival. The need to grow in-house talent while reducing dependencies on marketing agencies was also seen as crucial.

Going Digital

- Respondents highlighted gaps in the understanding of digital technologies and tools, using the tools for practice and production, and employing the digital medium to rethink and change the way the creative sector functions. Issues of accessibility, particularly in line with gaps in infrastructure, the urban-rural divide, and language concerns were highlighted as significant challenges of adapting to digital.

- Respondents stressed the need for a more structured environment — teeming with education opportunities, short courses, networking platforms, conferences and such — that could further bolster festival professionals to equip themselves with other important skills.

International Collaborations

- Industry events and short-term learning opportunities like workshops, conferences, international residencies, fellowships, awarded grants and related events, networking-focused events, and cross-continental project showcases were identified as critical points of contact for professionals looking to expand networks.

- In India, international cultural councils have played an instrumental role in enabling multinational collaborations through open calls, commissioned artistic work, touring support and industry meet-ups.

- The motivations of professionals to develop international connections range from seeking new artistic perspectives, breaking into new markets and developing touring circuits. The need for such networks is felt at local, national, and international levels. With a large number of festival professionals operating on a freelance basis, there is also a need to network across festivals to secure continuous employment through the year. Inter-organisational and inter-festival learning was also identified as a foundational need for networking in the sector.

Photo credit: Canary Wharf Winter Lights Festival by standard.co.uk

THE UK FESTIVAL SCENE

- Research funding organisations such as National Endowment for Science, Technology and the Arts (NESTA) and the Arts and Humanities Research Council (AHRC) have supported digital innovation in the festivals sector since the early 2010s.

- In 2013, the Digital Research and Development Fund for Arts and Culture was set up as a pilot project between the Arts Council England, AHRC and NESTA.

- With the COVID-19 pandemic, there is renewed emphasis and engagement with the role digital can play in the future of festivals, as exemplified by the AHRC's Audience of the Future Challenge, which places an emphasis on the "immersive" experiences.

- The use of social media in UK festivals has grown exponentially and fast replaced traditional methods of advertising and outreach. Social media that allow for the creation of community and interactive engagement, both at hyperlocal and on a global scale, form a large part of marketing and outreach strategy for most festivals. This sort of engagement has transformed the way consumers relate to festival products.

- Ticket sales are often made from websites, but aggregators such as Ticketmaster are often also the first port of call for many attendees, as they offer comprehensive up-to-date information on a range of festivals. There is now an increasing number of festival calendars and portals which aim to be a centralised resource with regards to festivals and updates, particularly crucial as the pandemic creates uncertainty around events being held.

The festivals sector in India is one which is in a constant state of flux and continues to be a vibrant space which has shown tremendous potential for growth even in the midst of a global pandemic.

It is a sector that has adapted itself chameleon-like to the ever changing needs and demands of its audiences and stakeholders. Adding to this is the ambiguity of trends development and operations in the largely unorganised culture sector in a multi-hued country like India, which makes the sector both exciting yet challenging for any kind of formal study. This report, in studying the ever-changing dynamics of the festivals sector, presents a strong platform for policy makers, stakeholders and festival goers to build and frame strategies that will lend to strengthen as well as give momentum to the meteoric growth of the festivals economy in India.

2. Structure of the festivals sector in India

Cultural festivals informally fall under the events and activations sector. A growing interest and engagement with the arts, culture and heritage[1] in general among the public in India and rising disposable incomes of younger audiences[2], has led to an exponential growth of the festivals sector in the past decade.

We have seen South Asia's largest contemporary art biennale crop up at Kochi in 2012. The Bacardi NH7 Weekender is now a multi-city annual music festival. Described as the world's biggest literary show, the Jaipur Literature Festival realised its first virtual version in January 2021 and has been hosting several monthly events since March 2020. The International Film Festival of India happens in Goa every year and the Madras Music Season boasts a tradition of more than 100 years. Along with them, there are hundreds of festivals of various genres, scale and content happening throughout the year, spread across the length and breadth of the country.

These festivals are created and run by governments, organisations, brands, communities, collectives and even individuals for various purposes including increased marketing and outreach, brand capital, livelihood, and even as an artistic practice. This diverse and upcoming sector is characterised by small permanent teams that bring on freelancers, independent workers, and consultants to work on their festival editions. Without any umbrella bodies or unions to represent the needs and voices of these professionals, most festivals operate in silos picking their own battles and fights to survive.

[1]Ruchika Kher, "Music festivals are mushrooming across India, and not just in the metros: What's driving the trend?", FirstPost, 22 January 2017. Available here.
[2]Harveen Ahluwalia, 'Millenials to redefine India's consumption story: report', LiveMint, 20 February 2018. Available here.

3. Festivals From India – By region, artform, digital presence and geographic location

From the mapping exercise that was undertaken, a total of 728 festivals were recorded as of September 2021. However, due to the pandemic, the total number of festivals has been fluctuating, accounting for the opening, reopening and closure of various festivals during this period, which is also reflected in the numbers below.

The festivals are spread across multiple genres and regions, with varying frequencies over the year. The digital presence of the festivals was also analysed along with the rural-urban spread. The regional spread of these festivals based on genre, frequency, digital presence and urbanity can be envisioned as follows:

ARTFORM X REGION

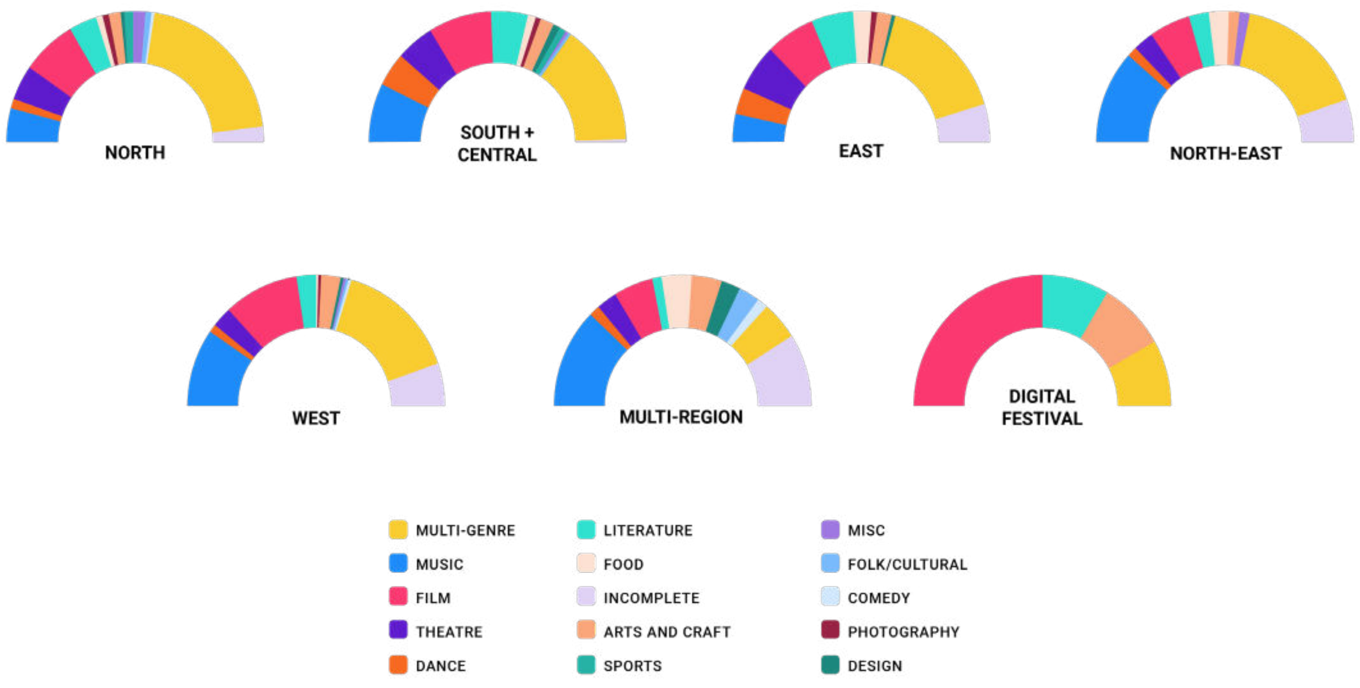

Image 1: Regional spread of festivals based on genre

	North	South + Central	East	North East	West	Multiregion	Digital Festival	Total
Music	11	34	9	9	28	10	0	101
Dance	3	20	9	1	3	1	0	37
Theatre	11	22	15	2	7	2	0	59
Film	18	37	17	4	28	4	3	111
Literature	9	22	14	2	7	1	1	56
Food	2	5	6	2	1	3	0	19
Photography	2	3	2	0	1	0	0	8
Arts and Craft	4	8	5	1	7	3	1	29
Design	1	4	1	0	1	2	0	9
Sports	3	4	0	0	0	0	0	7
Misc	4	1	0	1	1	0	0	7
Folk/Cultural	2	2	0	0	1	2	0	7
Comedy	1	0	0	0	1	1	0	3
Multi-genre	54	71	43	13	45	4	1	231
Incomplete/NA	5	1	12	4	15	7	0	44
Total	**130**	**234**	**133**	**39**	**146**	**40**	**6**	**728**

Table 1: Detailed regional spread of festivals based on genre

FREQUENCY X REGION

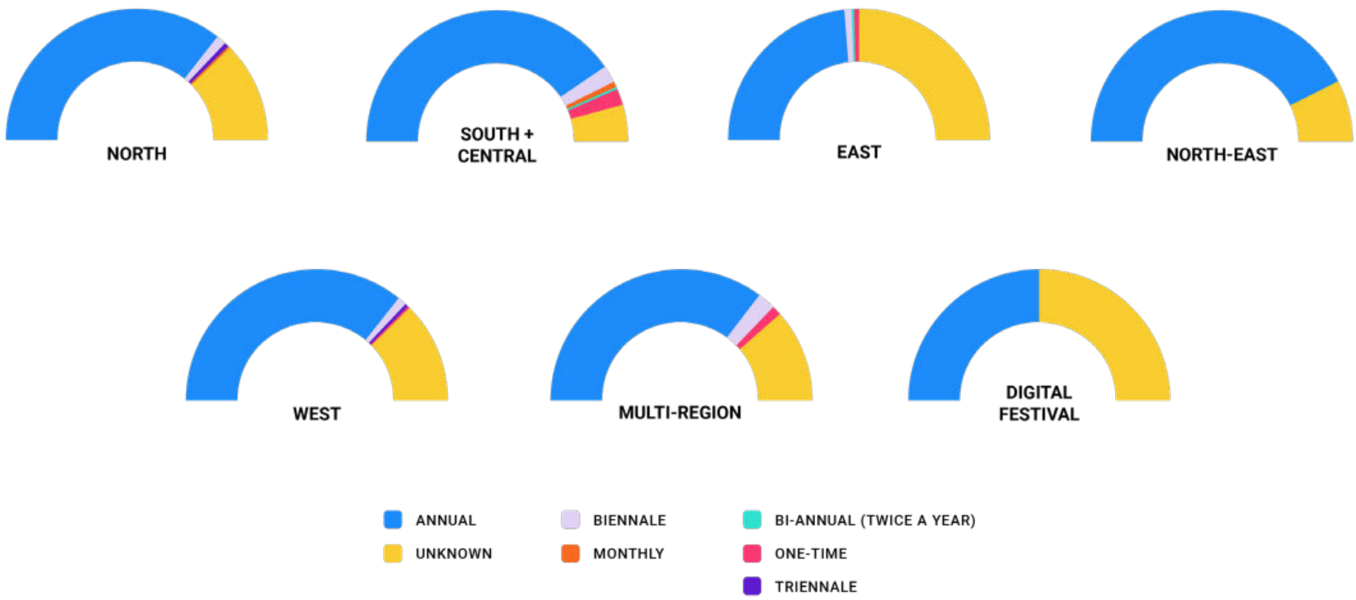

Image 2: Frequency of festivals based on regions

	North	South + Central	East	North East	West	Multiregion	Digital Festival	Total
Annual	93	187	62	33	107	31	3	**482**
Biennale	3	10	2	0	3	2	0	**18**
Triennale	1	0	0	0	1	0	0	**2**
Monthly	1	3	0	0	0	0	0	**4**
Bi-annual (Twice a year)	0	1	1	0	0	0	0	**2**
One-time	0	9	2	0	1	1	0	**12**
Unknown[3]	32	21	66	6	37	10	3	**175**
Total	**130**	**231**	**133**	**39**	**149**	**44**	**6**	**732**

Table 2: Detailed frequency of festivals based on regions

[3] This refers to festivals for which it is hard to determine the frequency, based solely on secondary sources.

DIGITAL PRESENCE X REGION

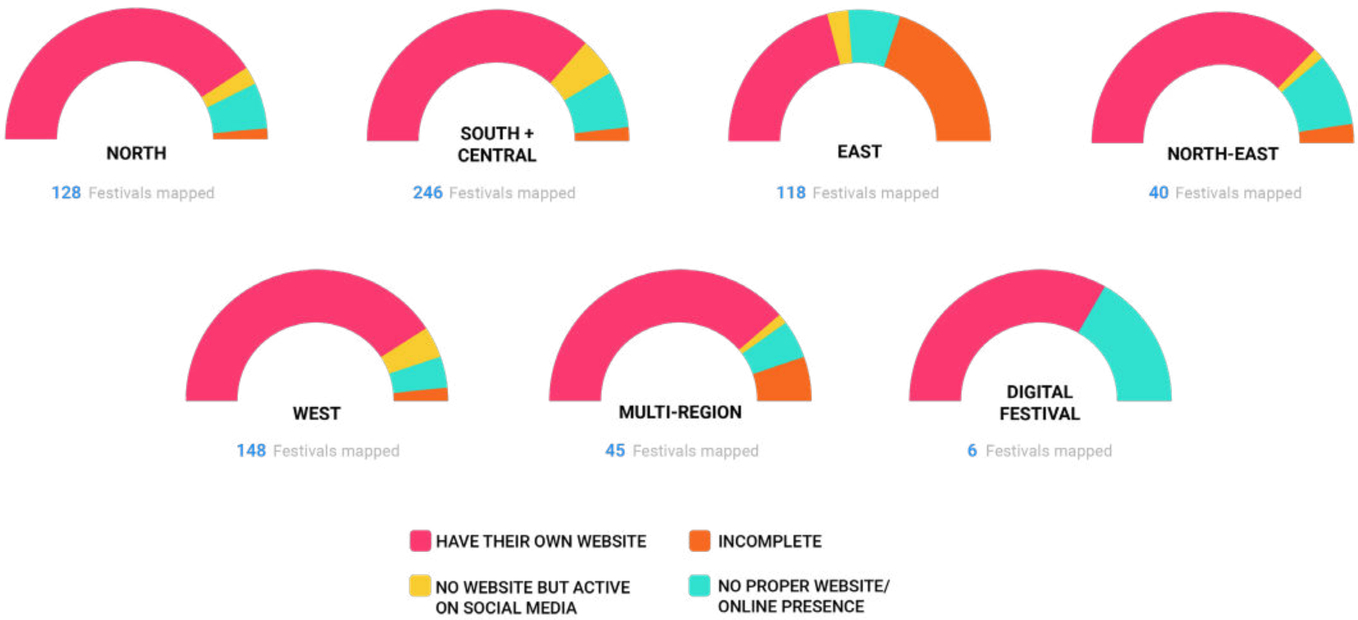

Image 3: Digital presence of festivals based on regions

	North	South + Central	East	North East	West	Multiregion	Digital Festival	Total
Have own website	104	181	50	30	121	35	4	525
No website but active on social media	6	23	6	1	11	1	0	48
No proper website/online presence	14	34	15	7	11	4	2	87
Incomplete[4]	4	8	47	2	5	5	0	71
Total	128	246	118	40	148	45	6	731

Table 3: Detailed digital presence of festivals based on regions

[4]This refers to festivals for which data is still being collected and verified while going to print.

RURAL AND URBAN FESTIVALS

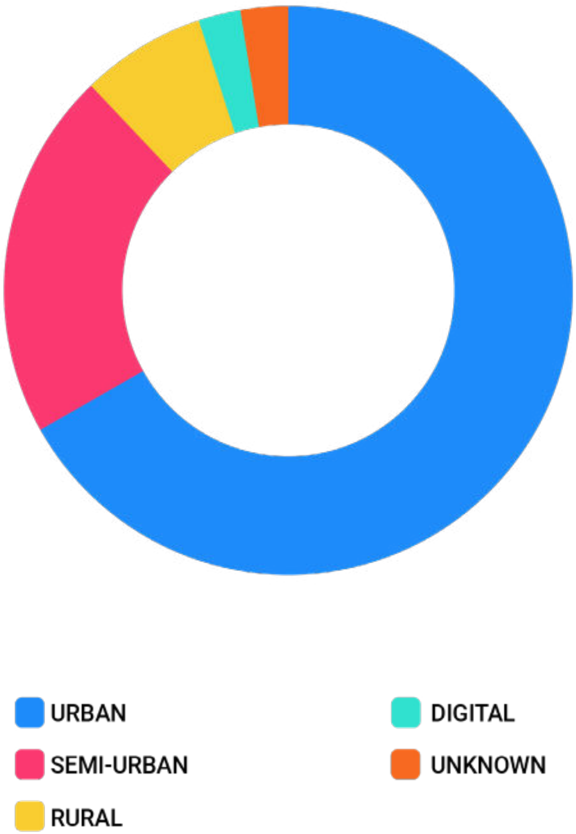

Image 4: Rural-urban spread of festivals in India

Urban	Semi-urban	Rural	Digital	Unknown[5]
418	132	44	15[6]	17

Table 4: Rural-urban spread of festivals in India[7]

[5] This refers to festivals which have not recently updated their information, making it hard to ascertain whether they will continue, and if so, in which format and where.
[6] This number has slightly risen from the figures in the previous tables since some additional festivals have gone digital as a result of the pandemic.
[7] The classification is based on the current HRA classification of cities as formalised by the Govt. of India. We have used the following breakdown:

- A1 + A = Urban [Ahmedabad, Delhi, Kolkata, Mumbai, Pune, Bangalore, Hyderabad, Chennai + others like Jaipur, Surat, Nagpur etc.]
- B1 + B2 = Semi-urban [Coimbatore, Agra, Varanasi, Bhubaneshwar etc.]
- C = Rural [all others]

THE DEEPENING IMPACT OF COVID-19 ON INDIA'S FESTIVAL SECTOR

In response to the COVID-19 pandemic, the British Council in India in partnership with FICCI and The Art X Company launched the Taking the Temperature (TTT) survey in 2020 to track the impact of COVID-19 on India's creative economy, gathering responses from creative professionals, arts companies, sector support organisations, policy makers, and funders. The survey was disseminated in three rounds as a tracer study to map the evolving impact of the pandemic. Of the total number of respondents to the survey, 35%, 39% and 33% of the total number of respondents in each of the three rounds respectively belong to arts and culture festivals. The following data has been extrapolated specifically for the festivals sector, based on the significant number of responses received from professionals working with festivals.

Respondents profile

Approximately 45% of respondents across the three rounds work as freelancers.

More than 40% of the respondents are founders/CEOs of their organisation and have 10+ years experience.

The respondent spread is equal across age and genders.

1/4th of the respondents work in organisations that have 2-5 employees.

The way things are

Ticketing as a major source of income fell from 32% in Round 1 to 14% by Round 3 of the survey.

Commissions, artist fees, business (as a vendor and service provider) are the top sources of income lost.

Almost 75% of the respondents surveyed feel extremely concerned about the impact of COVID on the cultural sector.

In round 3, 71% (of 77 respondents) felt that the uncertainty of holding events was the reason they couldn't continue with their projects in 2020-2021.

Inspite of the challenges, only 20% of the respondents have used any emergency monetary relief.

Out of 298 total respondents in Round 3, 25% believe that their organisation is in the recovery phase.

70% of the respondents in the third round said finance and funding will secure the future of their organisation/ artistic work.

The percentage of respondents expecting to lose more than 75% of their income has gone up from 26% to 34% from Round 1 to Round 3.

Adapting to changes

98% of organisations and respondents have adapted their business to the new realities of COVID, with 60% of them having moved to digital platforms.

Out of 150 responses in Round 2, 50% said that adapting themselves to change enabled them to continue with their programme and projects in FY 2020-21. 17% of them feel they need to bring new resources.

The percentage of respondents generating income from online platforms has gone up from 5% in Round 1 to 20% in Round 3.

Majority of the respondents in all three rounds said that emergency relief would be most useful for covering lost income and meeting basic needs.

1/3 of the respondents feel that they have adapted their business model/services to a great extent.

More than 1/3 have had to use reserves and 12% have had to lay off staff and employees.

Read the full report at britishcouncil.in

Developed in partnership by the Federation of Indian Chambers of Commerce and Industry (FICCI), Art X Company and British Council.

4. Festival audiences in India and their needs

To understand the shape and nature of arts audiences in India, we spoke to five festivals about their audience engagement strategies and contrasted the same with a series of interviews with festival audiences as part of the user research phase.

What festival audiences are looking for

- Audiences place emphasis on artist line-ups, artform preference and the promise of 'experience' the festival offers (For e.g. recognition of Jodhpur RIFF having high-quality performances, unparalleled experience).

- Audiences who have specific tastes relating to one genre or category of festivals will specifically look out for those festivals as opposed to others. Depending on the type of audience segment, the more creative inclined or those working in the creative sector are keen on particular artists and deeper engagement with the artists on their process of making and producing art.

- They look for content on the festivals — Themes, artist line-ups, information about travelling to the festival, access areas, stalls for food, water booths, hygienic sanitary facilities, parking, accommodation, specific facilities and comfort zones for those with access issues (physical, mental) are all important factors that help audiences generate trust and excitement towards a festival and make a purchase decision.

- Audiences often look for 'inspiration' at festivals. They search for a takeaway from attending these festivals.

- Most festivals are projected as apt for younger audiences, or specific interest groups. Few arts and culture festivals are seen as family-oriented. Inclusive festivals accounting for comfort levels of singles as well as family units, and pet-friendly environments is what people are looking for as well. "Is this festival for me?" is a question that still plagues many festival goers.

- Enjoying an experience together with a community becomes a bonding moment for people, that helps build trust in the community and becomes a lasting memory of the festival.

- Festival goers generally visit the festival with friends and family and would typically spend more than a couple of hours at the venue.

- Facilities like parking, nearby access to public transport play a big role in determining the interest, frequency and duration of visits to the festival.

- Sharing on social media is seen as a part of our culture and people do not tend to shy away from doing it.

- Online ticketing forms a bulk of the ticket purchases by audiences.

- A large proportion of the audience makes digital payments for onsite activities and tickets.

5. Conclusion

The Festivals From India — Needs and Insights report is the first of its kind, giving a nuanced perspective into the ever-growing, ever-changing festivals sector in India. While serving the larger purpose of designing and building the Festivals From India digital portal, the research in itself has unearthed a variety of important themes and issues that pertain to this sector.

The mapping of close to 700 festivals has shed light on the geographic spread, digital presence, reach, scale, organisational structure and skill gaps of local and national festivals. The in-depth needs analysis undertaken with festival stakeholders highlighted challenges such as the lack of skills and resources with respect to data collection, analysis and usage, the use of ticketing platforms and areas of growth such as community engagement and artist collaborations. It has also underscored the need for sustainable, creative and reasonable technical and production capabilities, the need for training to adapt to mushrooming digital realm and resources to build stronger international partnerships.

On the other hand, research regarding festival audiences has highlighted the methods and tools that festival owners use to better understand and cater to the needs and trends of their audiences. It has also brought forward the perspectives, behavioural and decision making patterns, and driving forces that influence the needs of festival audiences in India.

The report clearly proves that any intervention for the festivals sector in India cannot be a one-size-fits-all solution. The very complex, unstructured and informal methods of functioning in this sector make it difficult, but at the same time, exciting to navigate. The report also validates that this is a sector which is economically, socially and culturally significant for a country like ours. Thus, investing more resources to research, train, upskill and formalise this sector are imperative. This report is one step in that direction. It presents a strong platform for policy makers, stakeholders and festival goers to build and frame strategies that will lend to strengthen as well as give momentum to the meteoric growth of the festivals economy in India.

6. Recommendations

The following is a concise list of recommendations from which the sector could benefit:

- The formation of an association or a body that represents arts and culture festivals from India. This body would be tasked with advocacy, developing research and lobbying for the festivals sector in India.

- Festivals need to develop a common audience feedback mechanism, insights from which can be shared among each other at the later date. This can harness data and development of a pool of market intelligence that all participating festivals can access to develop their own audience building strategies

- The festivals sector needs urgent training programmes for festival professionals across various levels of the hierarchy. This can range from managerial to technical training.

- Health and safety at festivals has grown to be a critical area of intervention that festivals need to consider in order to grow and survive in a post pandemic world.

- Insurance schemes for festivals, particularly looking at event cancellations and postponements due to force majeure events, need to be brought to bear in line with the devastating impact of COVID-19.

Festivals From India (FFI) is made possible by the British Council as part of its Festivals for the Future programme, which brings emerging and established festivals together to connect, create and collaborate on international projects, with the vision to strengthen the creative economies of both India and the UK and enable sustainable capacity building in both countries. FFI has been designed and developed by ArtBramha. The Monitoring and Evaluation framework of the website is led by The Audience Agency.

ABOUT BRITISH COUNCIL

The British Council builds connections, understanding and trust between people in the UK and other countries through arts and culture, education and the English language. We help young people to gain the skills, confidence and connections they are looking for to realise their potential and to participate in strong and inclusive communities. We support them to learn English, to get a high-quality education and to gain internationally recognised qualifications. Our work in arts and culture stimulates creative expression and exchange and nurtures enterprise. www.britishcouncil.in

ABOUT ARTBRAMHA

ArtBramha Consulting LLP is formed as a consortium of key partners and directors at the Art X Company and NetBramha. ArtBramha is involved in delivering research, content and web development services to festivals and cultural organisations in India and South Asia. As part of its service offering, ArtBramha will provide consulting for project management, content services, research services, and design and development of web platforms, UX/UI and products for the arts and culture sector in the region.

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Contact :

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