BRITISH COUNCIL

FICCI

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Taking the Temperature
Report 1

Impact of Covid-19 on India's Creative Economy

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Part 1

Preface

Art is a necessity. We need art to illuminate the way to a different future. We need art in order to remind us of our humanity. Artists are our lifeline. They are our hope. They allow us to feel what we do not yet know. Art is essential. It is definitely not a luxury.

Angela Davis (writer, activist, philosopher and feminist). Speaking at WOW (Women of the World) Global 24, June 2020

The Taking the Temperature Report is a partnership of the British Council, Federation of India Chambers of Commerce and Industry (FICCI) and the Art X Company to record the impact of the global Covid-19 pandemic on the creative economy in India. The Taking the Temperature Report aims to report regularly to provide valuable insight from across the creative economy to:

- map the impact of the pandemic on creative sectors, arts companies and individual artists, managers and stakeholders
- regularly trace and report on developments and change over a sustained period, initially to October 2020
- report on systemic action which strengthens the creative economy, during and post Covid-19
- make recommendation for future creative economy development

This first report provides a snapshot of the situation in India since Covid-19 and the lockdown in late March 2020 to June 2020.

In late July 2020 the Taking the Temperature survey will be available to complete online in **Hindi, Bangla, Malayalam, Telugu, Kannada** and **Tamil**

Further reports end of September and December 2020; Final Report January 2021.

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, 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 Royal Charter and a UK public body. We receive a 15 per cent core funding grant from the UK government.

www.britishcouncil.in

Federation of India Chambers of Commerce & Industry
Established in 1927, FICCI is the largest and oldest apex business organisation in India. Its history is closely interwoven with India's struggle for independence, its industrialization, 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 Arts X Company
The Art X Company is a strategic consultancy undertakes consulting, curation and project management and research within the cultural sector in India. We also run a 53,000+ network of creative professionals via a Facebook group titled Arts and Culture Opportunities, Residencies, Workshops, Jobs in India a.k.a. Arts & Culture Resources India (ACRI) and a website. The Art X Company has worked extensively across the country, and for a range of clients in the for-profit, non-profit and government spaces. The organisation comprises a six-member team of highly passionate arts managers, strategists and researchers, and has presence in Mumbai and Bengaluru.

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

Acknowledgements

The partners thank all the respondents for making time to complete the survey, share experience and give valuable insight on the current situation during Covid-19. We will return to the respondents who have agreed to participate in the research again. In development of the reports the partners are grateful for support with the survey development and sharing with culture networks in India:

- **Craft Revival Trust** strengthening the research by widening access including survey translations into Hindi, Bangla and Tamil
- **The Department for International Trade**
- **Events & Entertainment Management Associations (EEMA)**
- **The Association of Indian Publishers**
- **Impulse NGO**
- **Crafts Council India**
- **The Charles Wallace India Trust**
- **The Japan Foundation, India**
- **North India Section of Textile Institute (NISTI)**
- **Arts & Culture Resource India**
- **International Council on Monuments and Sites (ICOMOS)**

Part 2

Executive summary

The Covid-19 pandemic is having an unprecedented impact on the creative economy worldwide.
The British Council, FICCI and Art X Company have partnered to report on the impact of Covid-19 on the creative economy in India.

In 2017 FICCI / KPMG the reported creative economy forecast for 2018 at 275 billion INR and the crafts economy growth to 239.6 billion INR. Growth rate was forecast at 2.5% creative economy and 10% crafts. During the Covid-19 pandemic the creative industries face an uncertain future. Sectors are contracting, organisations are facing up to difficult choices to ensure they sustain; and individual professionals are contending with short-term survival and decisions about whether they can afford to continue to work in the creative sector. The creative economy will be very different in the aftermath of Covid-19 and some sectors may be decimated.

India's GDP released (May 2020) shows the economy slowing to a 40-quarter low of 3.1% (y/y) in Q4 of FY2019-20 (Jan-Mar 2020). This takes India's annual growth for FY 2019-20 to 4.2%, the lowest since the 2008.



Barbara Wickham OBE
Country Director India,
British Council



Sanjoy Roy
Co-chair Creative & Cultural Industries, FICCI



Rashmi Dhanwani
Founder Director
The Art X Company

Research snapshot

Micro, small to mid-size enterprises

- MSMEs, the freelance workforce with large companies have been worst hit
- MSMEs make **88%** of the creative sector; with **32%** expected to lose **50%** of annual income in the first quarter.
- **53%** of Events and Entertainment Management sector experienced **90%** of their business cancelled between March-July 2020
- **41%** of the creative sector has stopped functioning during lockdown
- **61%** of organisations established between 4-10 years have stopped during lockdown.

Measures to support

- If available short-term financial relief would be used to keep freelancers and organisations viable as going concerns. **80%** would use financial support toward lost income, staff costs and immediate business needs.
- Cases of state interventions such as the Kerala Government and creative sector self-help programmes such as **STAYin aLIVE** provide powerful examples of what is possible with strategic support and collective action.

Mid to long term

- **88%** of the sector fears social distancing impacting on the creative economy over the long-term
- The creative sector is made of innovators who are resilient, adaptable and inventive organsiations pivoting online such as **India Craft Week**, the **JLF Brave New World** and **NH7 Weekender** show a spirit of solidarity between artists and audiences to continue to create and connect. However, the short-term impact of Covid-19 on the creative economy globally and in India cannot be underestimated and looks extremely bleak.

Research context and limitations

The partners are mindful this first Taking the Temperature Report is a snapshot study and as such one of many important creative industry researches currently underway in India. The partners aim for this report to be a valuable addition to the quantum of research, insight and thought leadership. In this first Taking the Temperature Report we chart how India have responded to the crisis:

The global pandemic has had a dire short-term affect on the cultural sector both in the UK and around the world with theatres, cinemas and libraries closed; festivals and events cancelled; and artists and audiences confounded by social distancing and lockdowns.
The impact of Covid-19 on the cultural sector in the UK has been profound with the closure of venues and the cancellation of major events like Glastonbury and the Edinburgh Festivals. The UK sector is not alone in this – Covid-19 has affected artists and institutions around the globe.

The pandemic is tracking across continents, regions and nations in different stages, timeframes and levels of impact. As the UK's international organisation for cultural relations the British Council global network in East Asia, the Americas, Europe and East Africa are currently tracking the impact of Covid-19 on the creative economy.

***Insights Articles*:** in a series of insight articles the British Council has reported on the impact of Covid-19 on the culture sector in China and East Asia

- **China:** ***British Council Insight Article China***

- **East Asia:** ***British Council Insight Article East Asia***

Participation and limitations

All told up to 12 June 2020
368 surveys have been completed across the (318) British Council and the (50) Art X Company surveys. This equates to circa 7% of those in receipt of the first round of the surveys circulated via e-distribution to 9,500 data set. Within our survey population we have a confidence rate of 95%.

96% of the respondents consented to participate in the survey. 91% said they would be willing to complete to survey again.

Some of the questions in the survey ask for 'Other' as an option this has in some cases skewed a few findings. We will change this in the second iteration of the survey.

We are aware this is a snapshot of the current situation. In the coming 3 months and has been completed by English language speakers only to date. The survey will be available in translation online in **Hindi, Bangla, Malayalam, Telugu, Tamil** and **Kannada**; as well as English as we aim to reach out further across India to ensure maximum quantitative and qualitative impact ***The survey linked here***

Most of our partners who have shared the survey have a wider network of institutions than individuals and hence the survey results might reflect a more top-down approach. However, a comparative approach over the next two cycles surveys will help determine both larger organisations as well as individuals and gig workers.

There is lack of research studies on the topic. As compared to the West, there are few robust impact analysis studies being conducted in India for cultural projects — which are in the public domain — providing little precedent for us to contextualise our research while working to gain fresh insights into the subject. In fact, the Impact Analysis study conducted for Serendipity Arts Festival in 2018 and the Kochi-Muziris Biennale in 2017 are the only reports on major cultural projects in the last five years; these reports were focused on visual arts. Hence, we had to develop an entirely new research approach relevant to an Indian multi-dimensional art sector, while keeping in mind the context of the cultural ecosystem in this decade.

Unavailability of adequate government data. While the research team could access and analyse some government data available on national and some state investment in culture, we understand several data sets are either not being collected or do not exist. Such data sets, such as on culture sectors and creative economy reports, would have significantly contributed to our analysis.

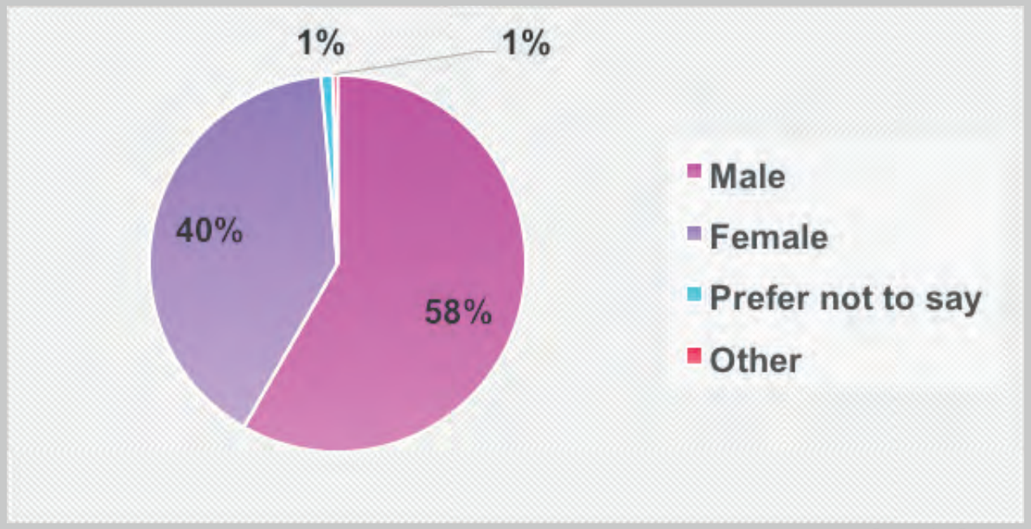
Terminology and definitions – 1) creative economy and 2) creative industries referred to in this report means 1) the quantum of sectors including organisations and individual professional which make up the creative economy and 2) the segmentation of different sectors e.g. Advertising, Literature and Publishing, Performing Arts

96% of the respondents consented to participate in the survey. **91%** said they would be willing to complete to survey again

Respondent demographics

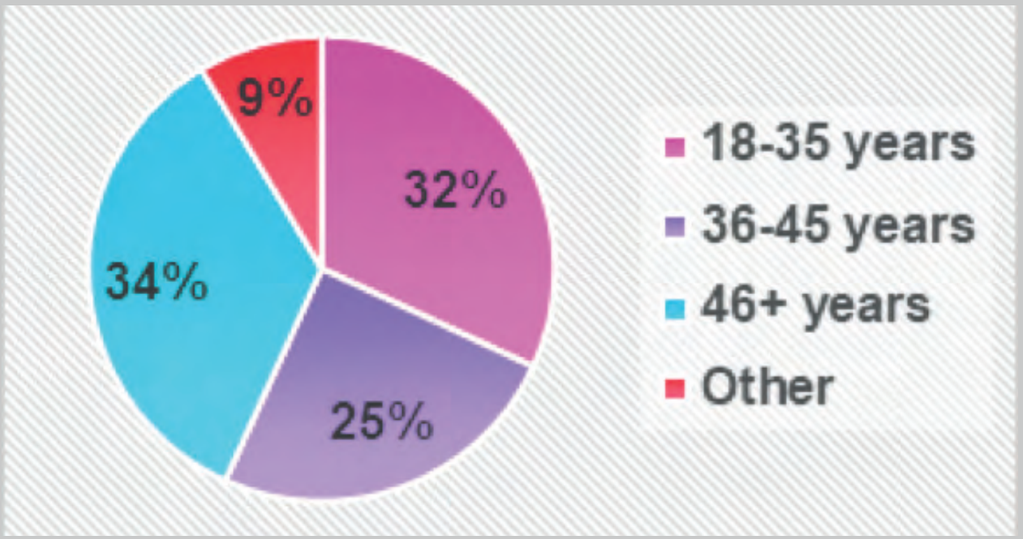
Broadly the respondent's map against the demographics of India, with a skew toward men working in the creative industries and the relatively young population of India **(65% below age of 35 years)**.

Gender



Graph1 : Gender

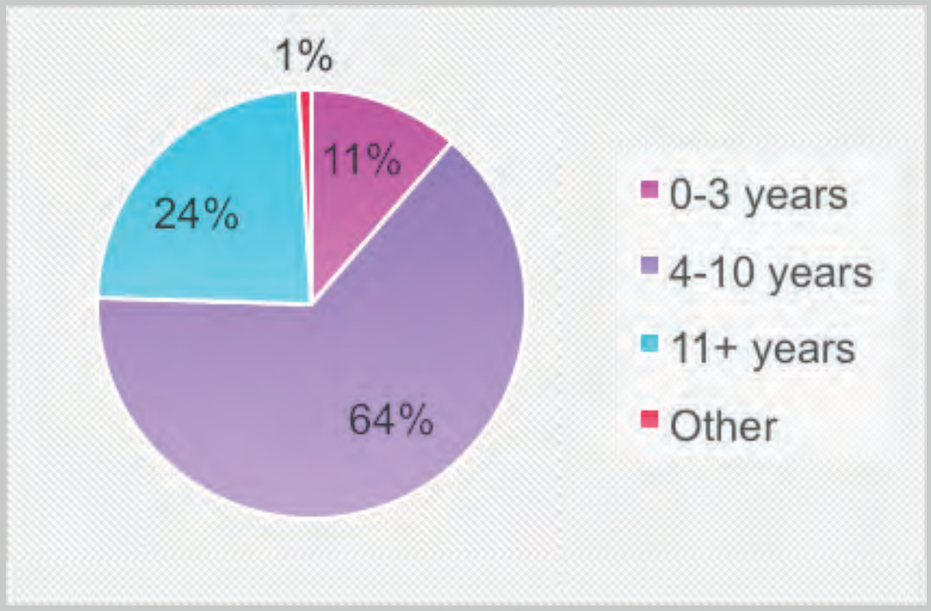
Age



Graph2: Demography - Age

Numbers of years in the creative sector:

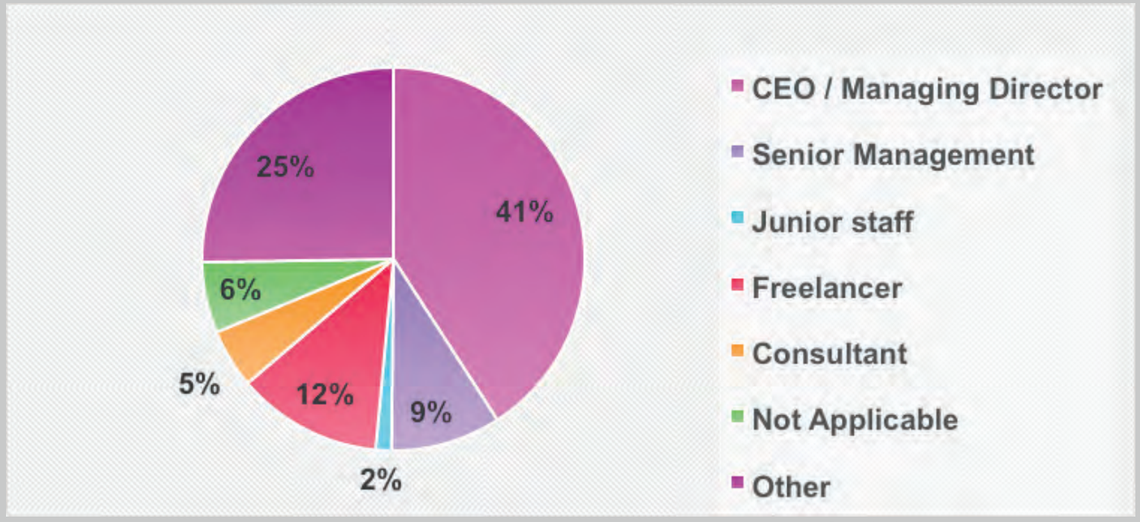
Numbers of years working and operating within the creatives industries **64% under 3 years** reflect the growth rate in the enterprise culture in India. This is also an indicator of organisations who are likely to be most at risk as a result of the Covid-19 pandemic; whereas **24% of organisation** have been running for 11+ years and are likely to have greater resilience to sustain through Covid-19



Graph3: Demography - no. of years in creative sector

Seniority of management representation

The Seniority of Management in organsiations indicates key leaders and Senior Managers in the sector working at strategic level, and who are the decision makers regarding the organisations response and changes to business models because to Covid-19.

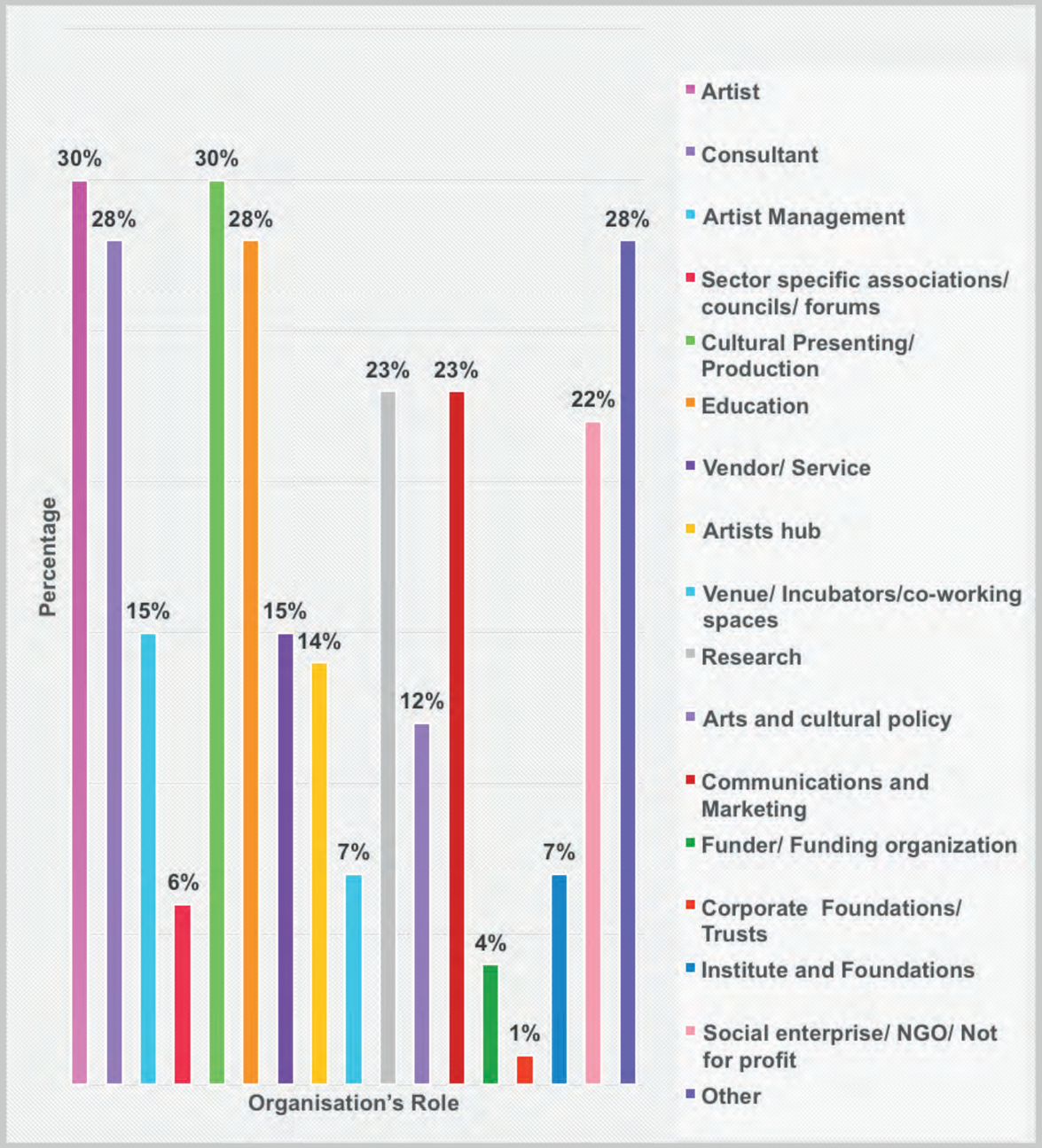


Graph 4 : Demography - Seniority

Taking the Temperature
Research summary

Type of organisation and activity

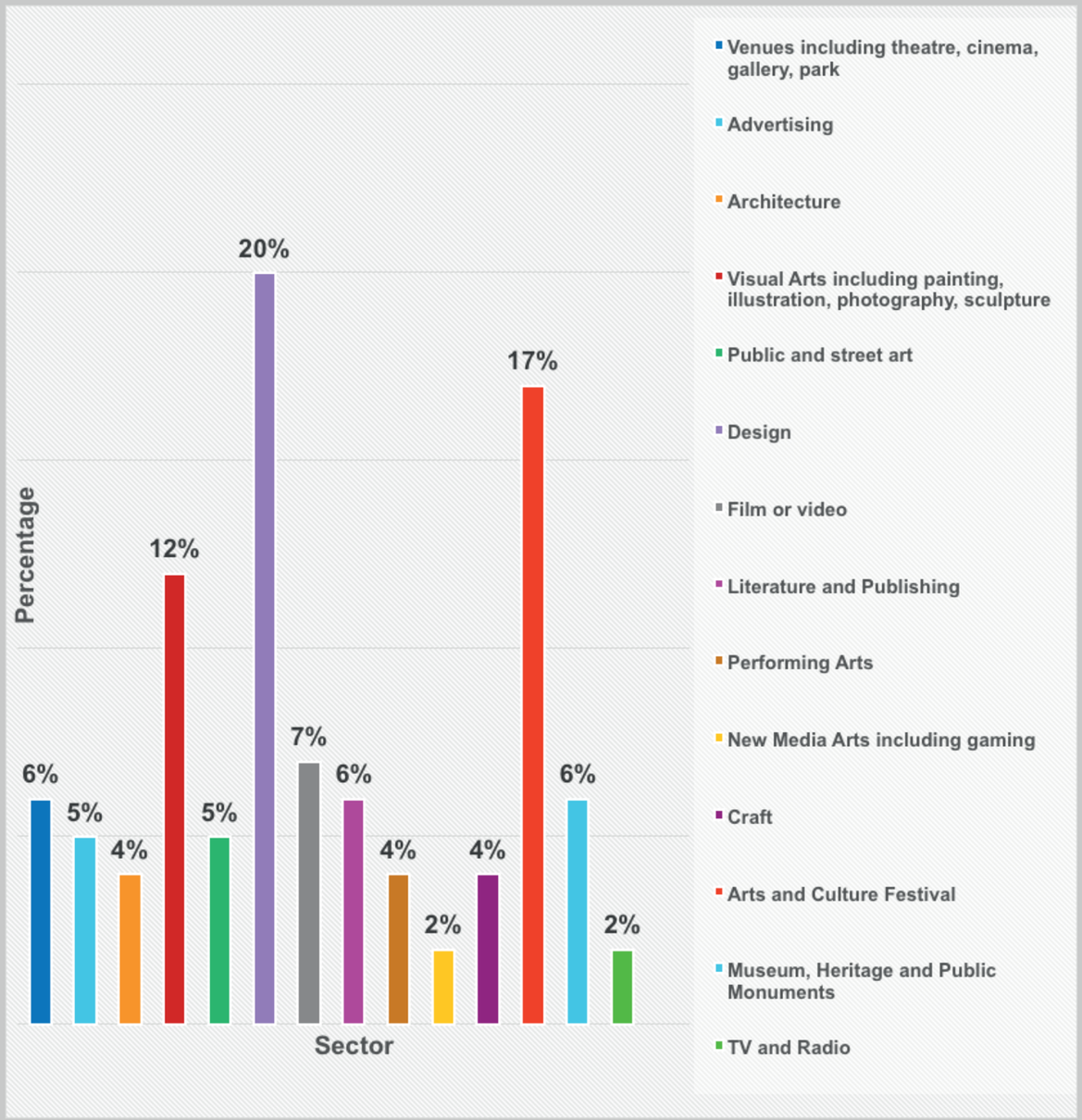
The range of single in some cases multiple activities most cultural organisation and individuals are engaged with reflects the entrepreneurial approach to multi-faceted business models across the creative sector in India



Graph 5 : Types of organisations

Creative Sector

Mapping against the Department for Digital, Culture, Media and Sport (DCMS) segments of the creative economy in the UK, respondents in India significantly represented in **Design 20%, Festivals 17%.**

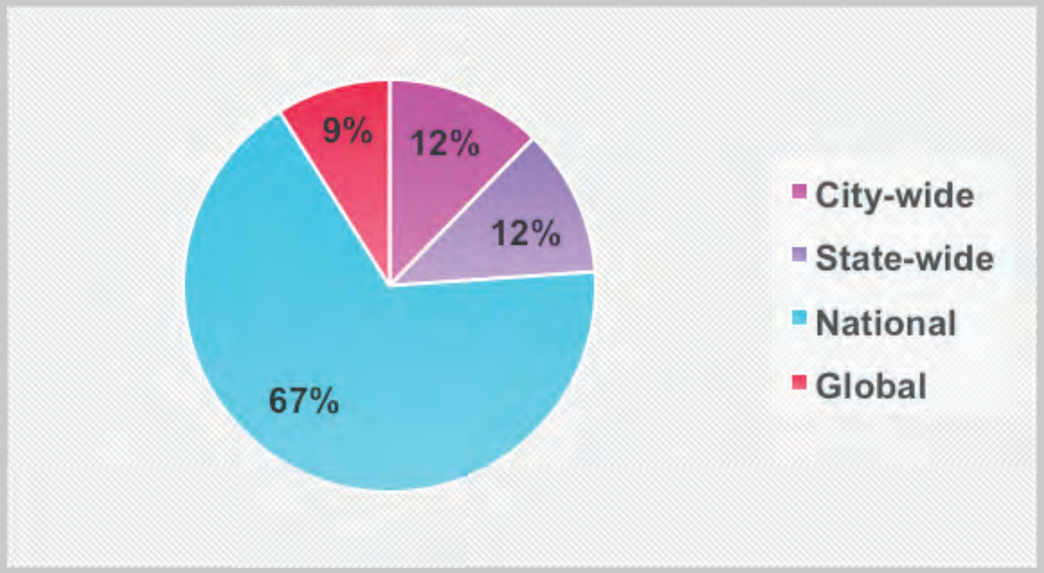


Graph 6 : Types of Creative Sectors

Scale of activity and size of organisation

Geographic focus of activity

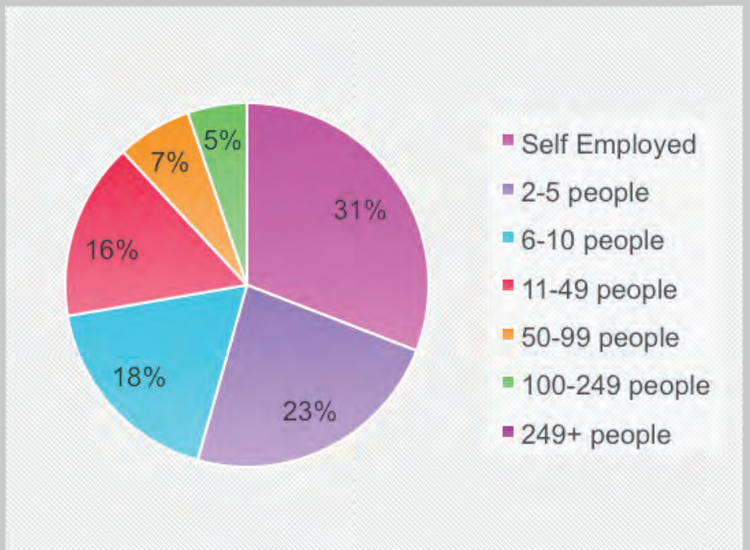
India is a large and complex country, the mix of city/state-wide and national and global focus of activity provide insight into intensity **24% of activity in metros and non-metros** relative to nationally delivered programmes, with 9% of creative organisations working internationally.



Graph 7: Geographic focus of activity

Micro, Small, Mid and Large-scale

In the main the creative sector consists of **Micro, Small to Mid-size Enterprises (MSME's) and self-employed, make up to 88% of the sector. While self-employed, 2-5, 6-10 workforce organisations make 74%;** They are by contrast both vulnerable and agile. It is likely that they are not beneficiaries of major government schemes or subsidies. Kerala (see Case Study). The MSME sector could benefit by working together to galvanise support in bidding for government funds collectively.

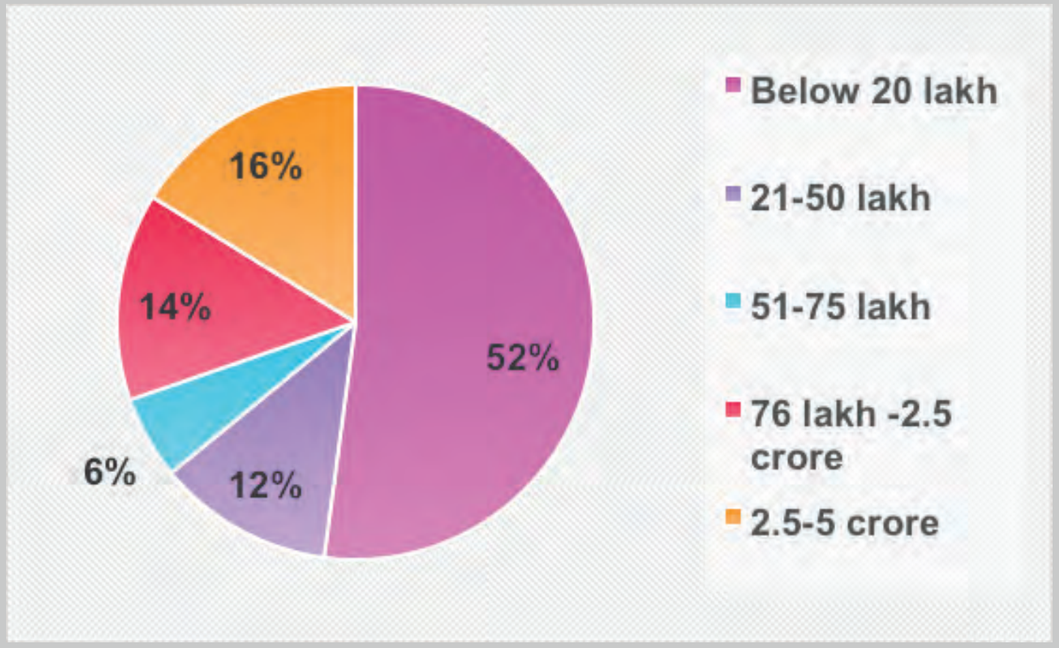


Graph 8: Scale

Financial models

Turnover in 2019-2020

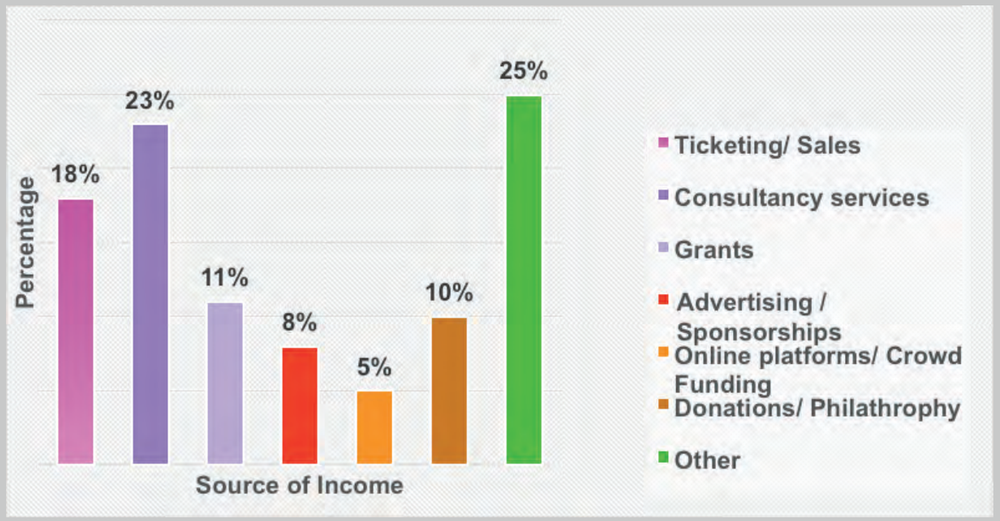
Financial turnover reflects the MSME nature of the creative sector in India and maps against the extensive freelance and gig-economy instrumental in the creative sector workforce.



Graph 9 : Turnover

Source of Income

The range of sources of income reflect the mixed economy of the creative enterprise sector, with only **11% of income from private and government grants**, **5% online and crowdfunding** and **10% philanthropy**. When packaged together all other areas of income are broadly a return for sale of goods and services, therefore significantly 74% of income generated is likely to have stopped or been curtailed as a result of Covid-19.

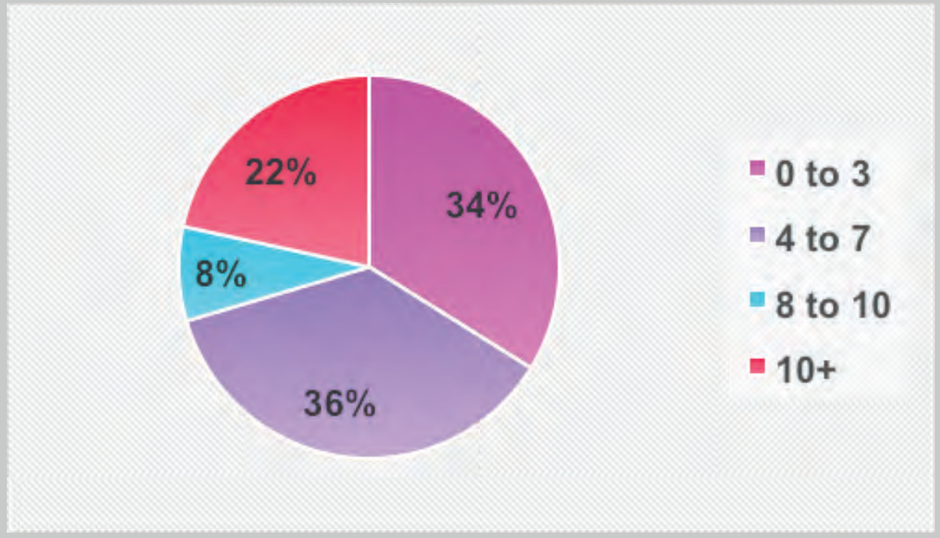


Graph 10: Source of Income

Since the Covid-19 pandemic and India's lockdown in March 2020

Events cancelled and projects postponed until November 2020?

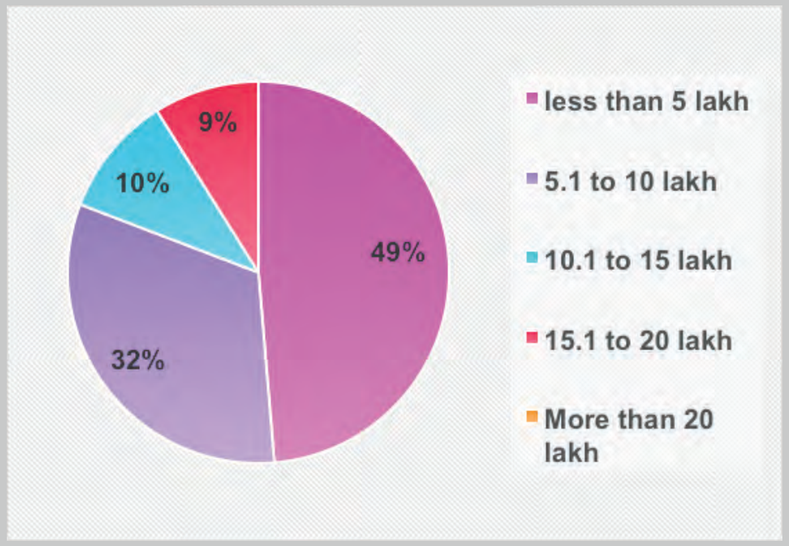
70% cancelled and postponed work up to 7 events indicates temporary disruption to business continuity and loss of income since lockdown in March 2020. As an associated corollary to this around **53% of EEMA companies resulted in 90% of their business being cancelled** between March-July 2020. While EEMA represents a specific sector of events and entertainments they are a key service sector of the creative industries.



Graph 11: Cancellation and Postponement

How much financial loss have you estimated or already incurred (INR)

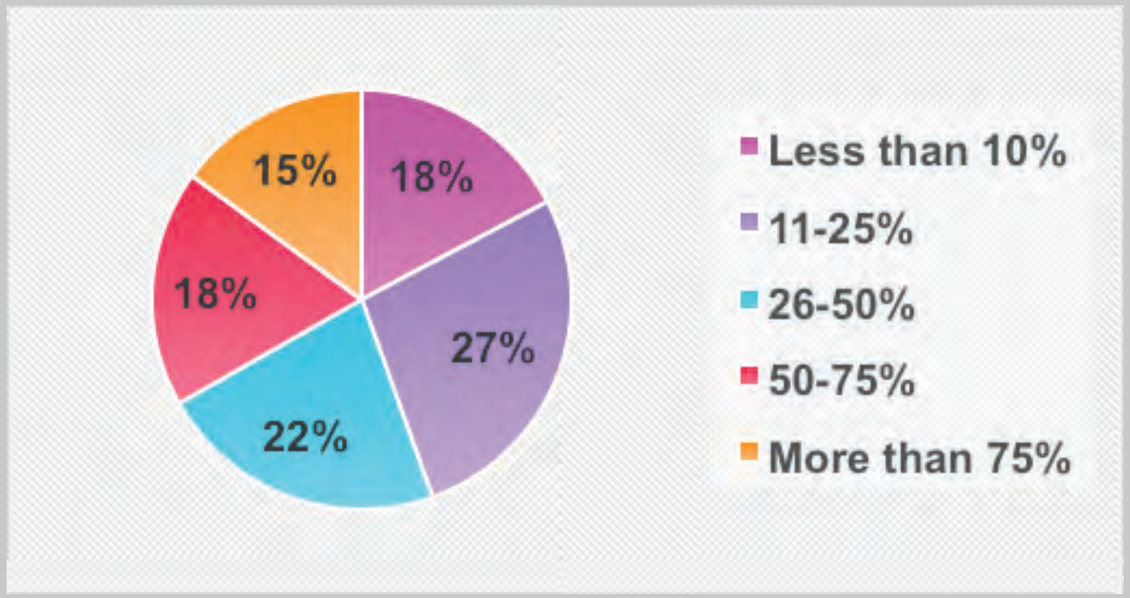
Financial losses to annual income incurred within the first quarter since lockdown in March. **32%** are expected to lose above **50%** of their annual income. Of these **10%** have lost more than 20 lakh. As corollary **63.1%** of EEMA companies i.e. around 107 companies suffered from a revenue loss of up to 1CR



Graph 12: Scale of Financial Loss

Percentage of annual loss in turnover to date in 2020-2021

Financial losses to annual income incurred within the first quarter since lockdown in March. **32% are expected to lose above 50% of their annual income**. Of these **10% have lost more than 20 lakh.**



Graph 13 : Percentage of annual loss

MSME and freelancers along with larger companies have been worst hit. However, large companies are more likely to come under some subsidy to enable them to survive while MSME's are most at risk of closing-down.

MSME organisations capacity to remain 'going concerns' will be dependent on the level of their reserves. Usual charity guidance requires 3 months working capital for orderly wind-down.

Turnover / Operation during lockdown
Organisations with lower turnover are finding it harder to deal with the crisis.

Turnover (INR)	Not operating	Operating	Total
Up to 20 lakh	49%	51%	163
21 to 50 lakh	44%	56%	34
51 to 75 lakh	38%	63%	16
76 lakh to 2.5 crore	33%	67%	39
2.5 to 5 crore	15%	85%	46
Total	**41%**	**59%**	**298**

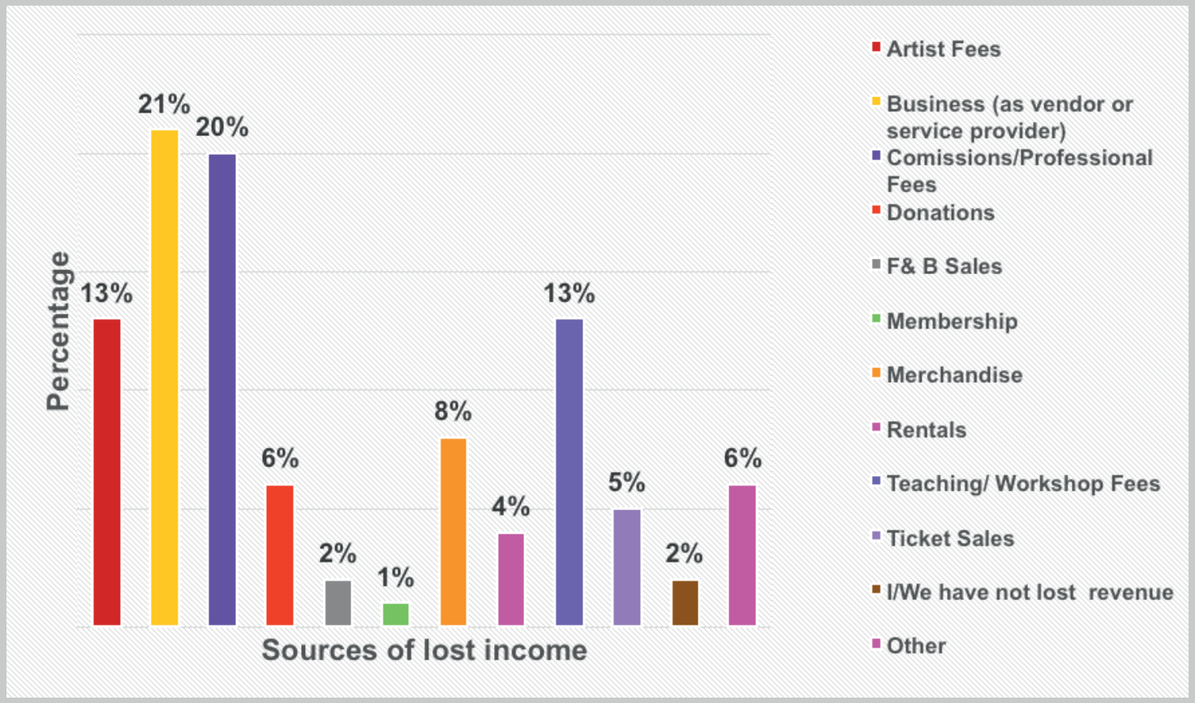
Table 1: Turnover /Operation during lockdown

Sources of lost income

There is serious threat to individual livelihoods and MSME businesses: artist fees, teaching and workshop fees; and professionals service and consulting fees generally form a large part of individuals and micro enterprises revenue streams. Therefore **43%**, (combining all three lost incomes sources) is a major body blow to the sector.

The arts service sector faces **21% of income losses**.

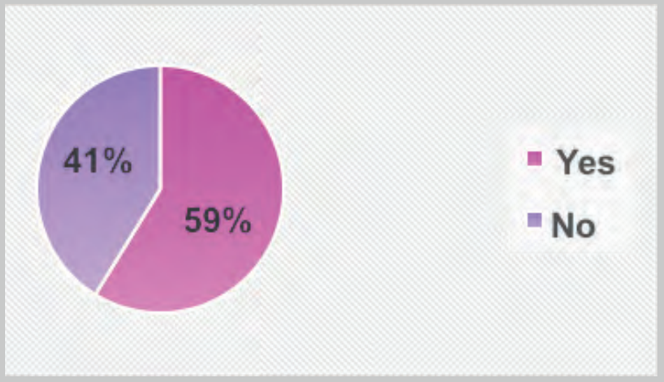
Given most grant income is guaranteed for minimum 1-year franchise, it likely any cuts in private and government grants will be felt in 2021-22.



Graph 14: Sources of lost income

Business operational during Covid-19

In the main most organisations and freelancers have continued to function in some basic capacity during Covid-19, however, **41%** have stopped altogether temporarily.



Graph 15: Business Operational

Business still functioning during Covid-19 relative to years in operation

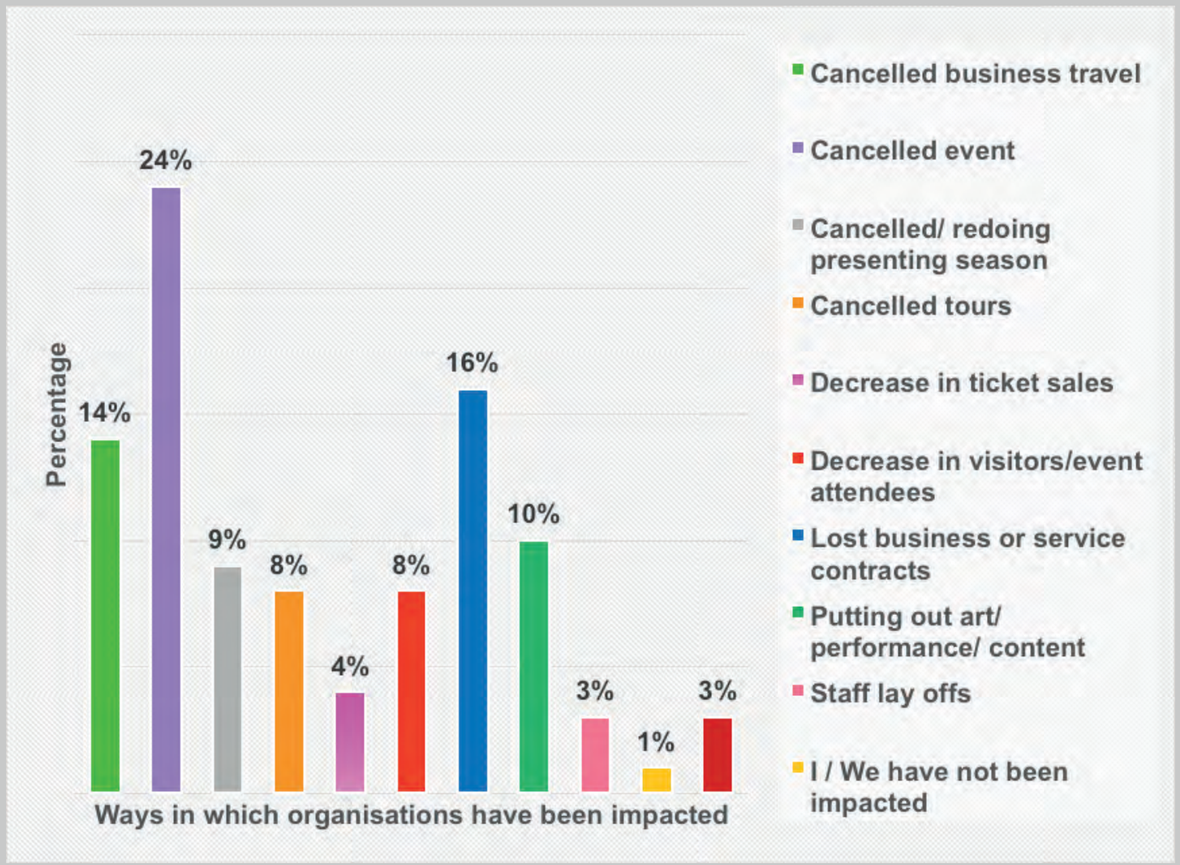
A relatively even spread of all organsitions who have stopped functioning.

Age of org	Yes	No	Total No
0-3 years	44%	56%	50
4 - 10 years	39%	61%	77
11+ years	41%	59%	143
Total	41%	59%	270

Table 2 : Organisations stopped functioning

Ways in which businesses have been impacted

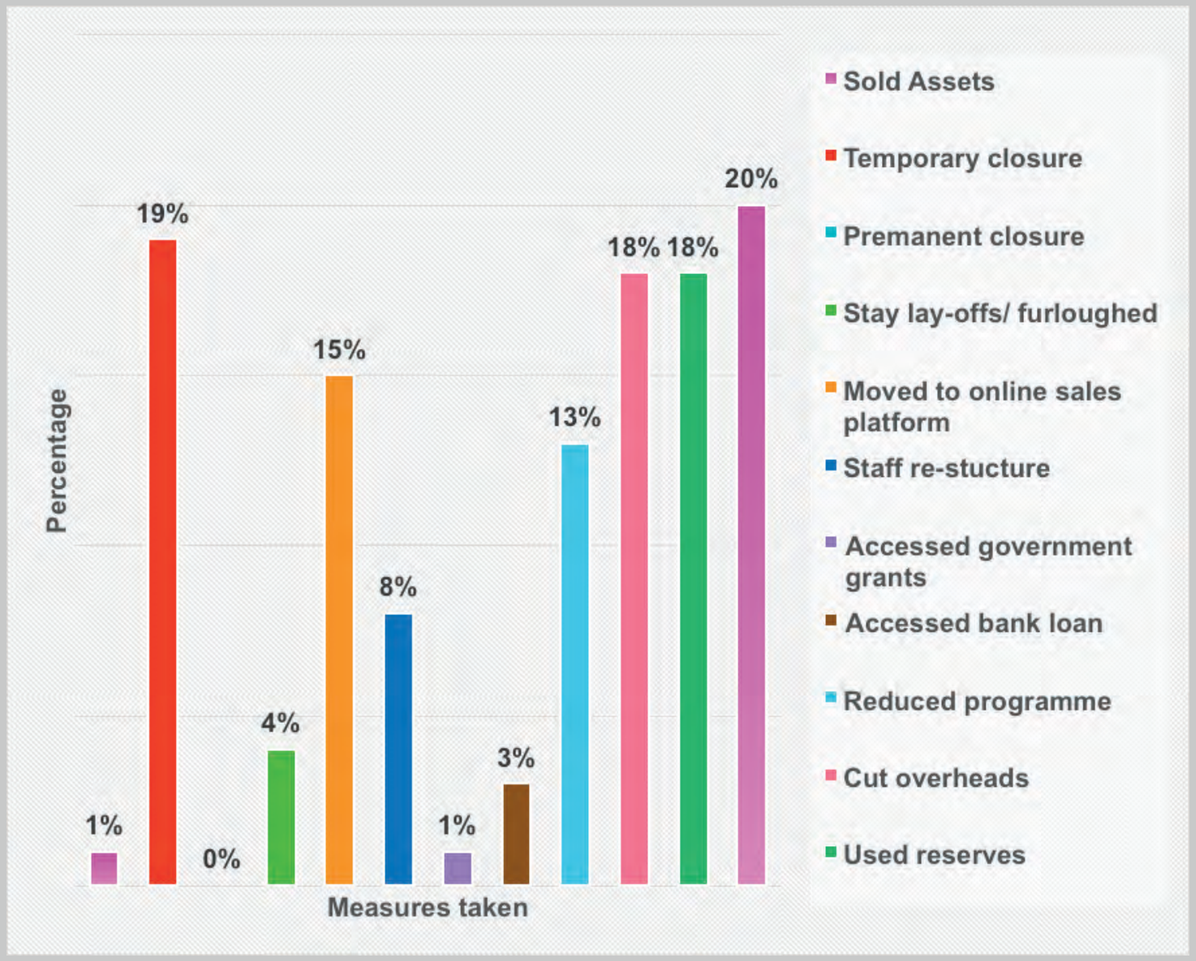
In the main **41% business** have substantially reduced and cut programmes and **16% have had contracts cancelled.**



Graph 16: Business impacted

Measures taken to manage risk during Covid-19

36% use of reserves and reduced overheads, **15% moved to online sales platforms** and **13% have cut programmes**. Reduction in core costs and move to online sales indicative that business models are likely to be redeveloped over Q2 and Q3.

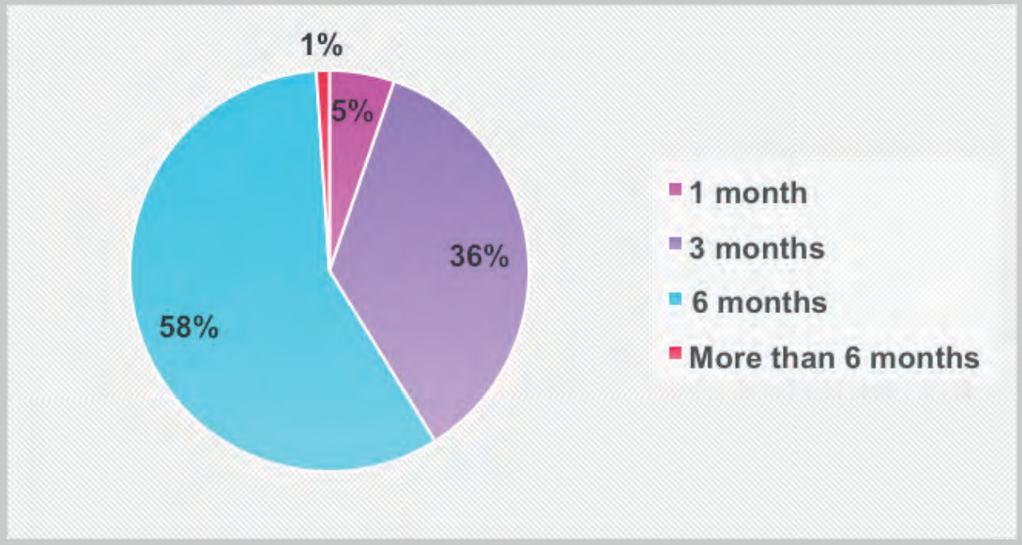


Graph 17: Measures taken by organisations

Time for business recovery post Covid-19

Business recovery in the main would take up to 6% months. There is no hard data yet from other developing economies regarding time for recovery of the creative sector post Covid-19.

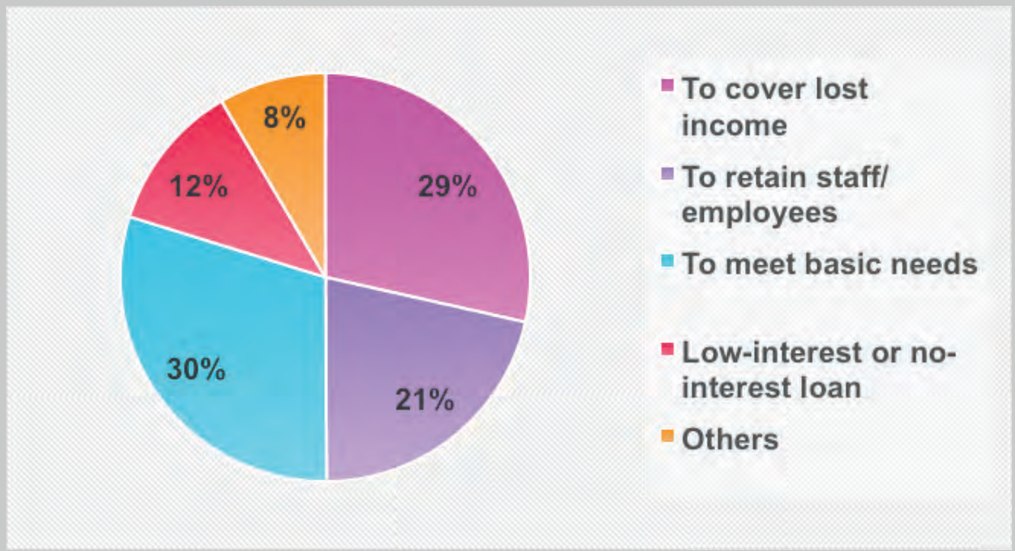
However, CINAR Survey reports: **61%** of the respondents expect a recovery in the next 12 months. **27%** of the respondents expect a recovery of programming activities by spring 2021. **33%** expect recovery in the autumn of 2020 or winter of 2021. The best assumption to date therefore is up 24 months for recovery of sectors and business who survive the crisis.



Graph 18: Time for business recovery

If you had emergency financial relief, how would you use it?

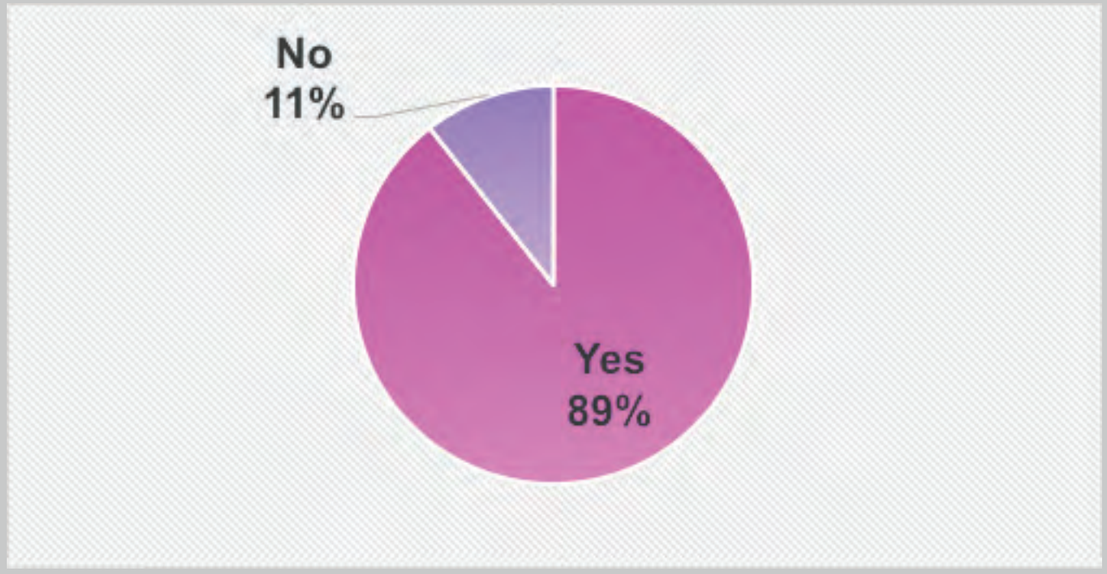
If available short-term financial relief would be used to keep freelancers and organisations viable as going concerns. **80% using financial support** toward lost income, staff costs and immediate business needs.



Graph 19: Emergency relief usage

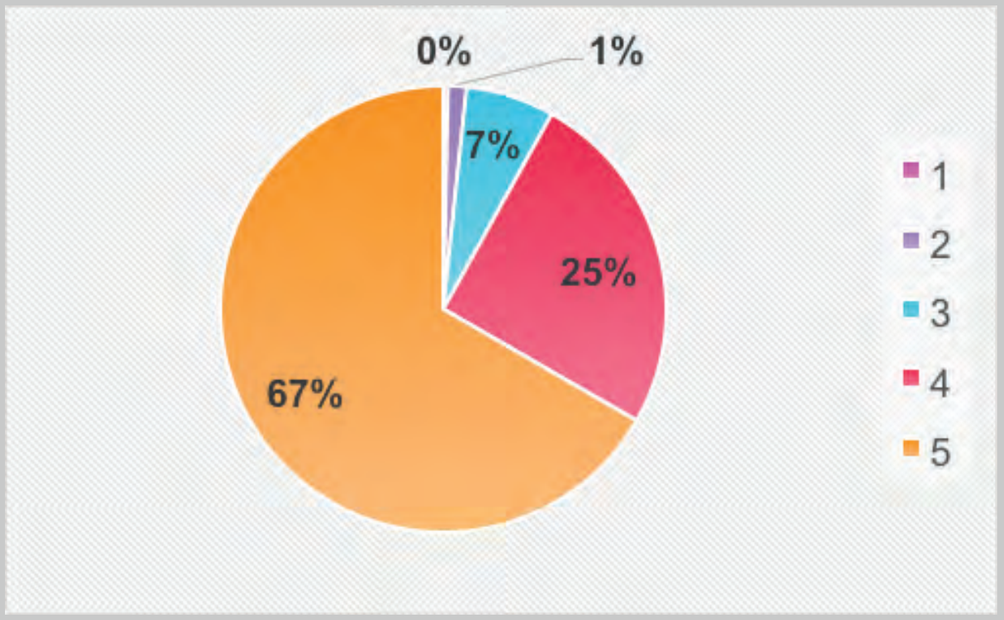
Do you foresee social distancing impacting your business over the long-term?

The long-term 'fear factor' around social distancing and the impact on the creative sector is clear with **89% concern** regarding the practical implications of social distancing and **67% being seriously concerned** about the long-term impact generally. It is perhaps this emotive area, matched with measures taken to manage risk which is of key concern as organisation and freelancers make choices around the viability of continuing within the creative industries. We will track this trend over the coming months.



Graph 20: Social distancing effect

On a scale of 1 to 5 (1 being low, 5 being high) how concerned are you about the impact of Covid-19 on the Indian culture sector?



Graph 21: Concern

The Art X Company Survey Summary

50 responses have been received from the Art X

50% are from **Mumbai. 23%** are from **Bengaluru** and other **cities and 27%** are from **Delhi NCR.**

Age

46% aged of 25-34 years

36% aged of 35-44 years

4% aged of 18-24 years

Type

33% artists

26% Cultural presenters

21% Educators

Size of organisation

40% 1-5 people in their organisation

32% freelancers

2% large organisations 50-100 people

44% artists / independent creatives

40% not-for-profit

10% for-profit

6% small business owners

Cancelled events until end of October 2020

- **36%** 0-3., **38%** 4-7 projects

Lost gross revenue

- **12%** more than 20 Lakhs
- **52%** less than 5 Lakhs

Loss as a % of annual revenue

- **14%** more than **75%**
- **14%** 50-75%

Sources of lost income and revenue

- **30%** artist fees
- **25%** professional fees
- **25%** teaching

Impact on business / measures taken to manage risk

48% said impact has been due to event cancellation while the rest of the data is divided between business travel, cancellation of tours and loss of business service contracts equally.

Emergency financial resources

- **47%** to meet basic needs
- **33%** relief to cover losses
- **20%** low interest or no interest loans

Trends analysis of responses received from British Council and Art X Company surveys

British Council

Art X

Graph 22: Trends analysis - response received

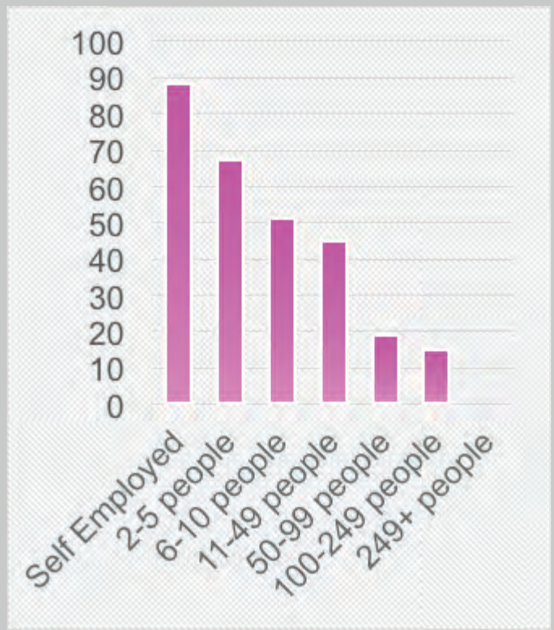
British Council: Role of the organisations who have responded are almost equal and includes social enterprises, institutes and foundations, artist management, vendor service art and cultural policy amongst others.

Art X: **33%** are artists and **26%** of the respondents are cultural precentors

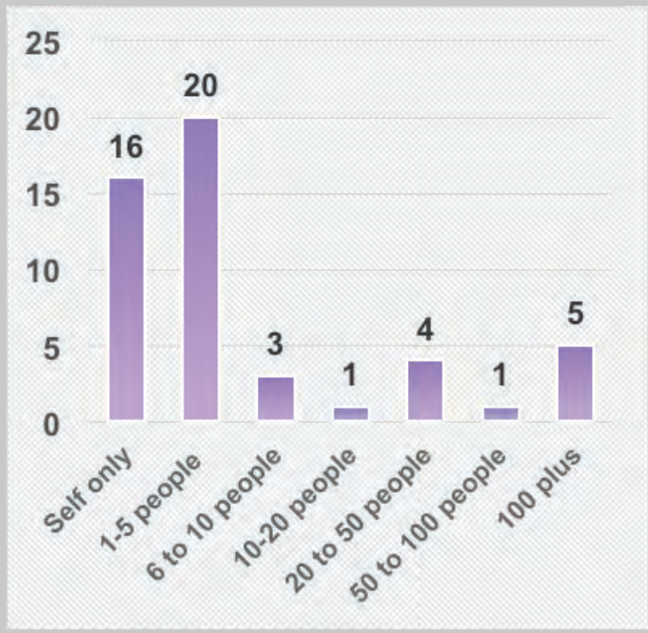
Comment: Categories were much more diverse in the case of British Council and hence wide diversity in respondent profile.

How many employees do you have in your organisation?

British Council



Art X



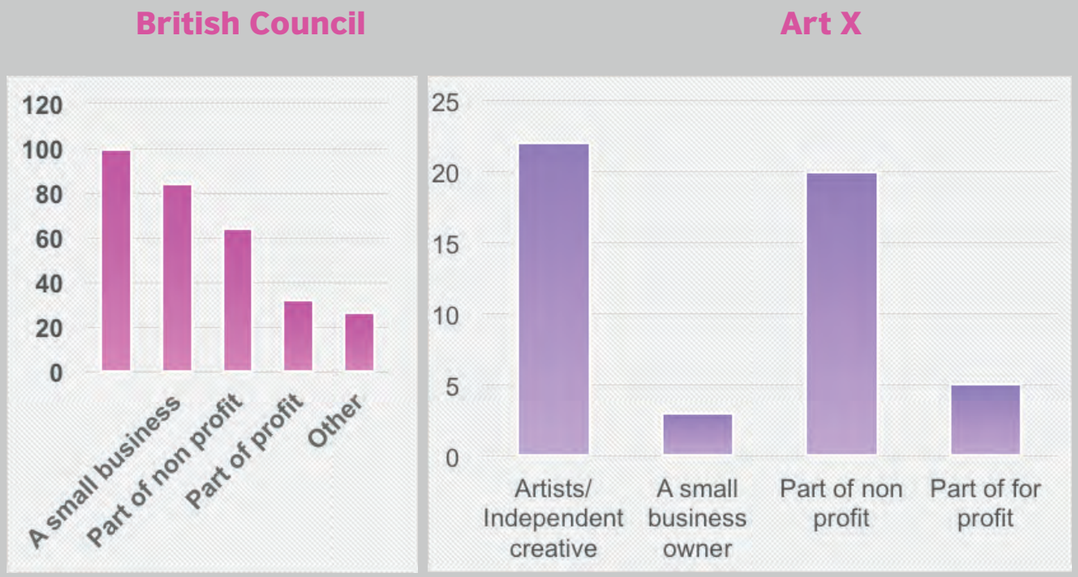
Graph 23: employee strength comparison

British Council: Significant majority of the respondents **(31%) are self-employed** while **23% employ only 2-5 people**. We may assume **54%** of the responders are quite vulnerable at this moment in time.

Art X: **40%** have 1-5 people in their organisation and **32%** work by themselves and **2%** are large organisations having 50-100 people

Commonality: In both the cases there is a significant number of respondents; **31%** in case of British Council and **32%** in case of Art X who are self-employed. In both cases large number of those who do employ have a small a group of people in their organisation.

What category do you fall within?



Graph 24: respondent category comparison

British Council: The largest number of respondents **(36%) are artists freelancers or consultants** followed by **small business owners at 30%**. Another **23% are part of nonprofit** and **11% are part of profit making organisations.**

Art X: **44%** of the respondents are artists / independent creative, **40% are part of nonprofit** while **10% are part of profit 6% are small business owners.**

Commonality: In both cases the larger number of respondents are Artists/Freelancers/Consultants. Considerable number of respondents are small business owners in the case of British Council which is absent in Art X. On the other hand, a larger number of respondents are from non-profit organisations in the case of Art X.

The Arts & Culture Resource India (ACRI) and **Art X** network comprises mainly individuals and small organisations, i.e. those who are rarely a part of existing networks. While the British Council audience profile and partner organisations for this study drew from a larger network of mid-size organisations.

How many events and / or projects have you had to cancel or postpone until end of October 2020?



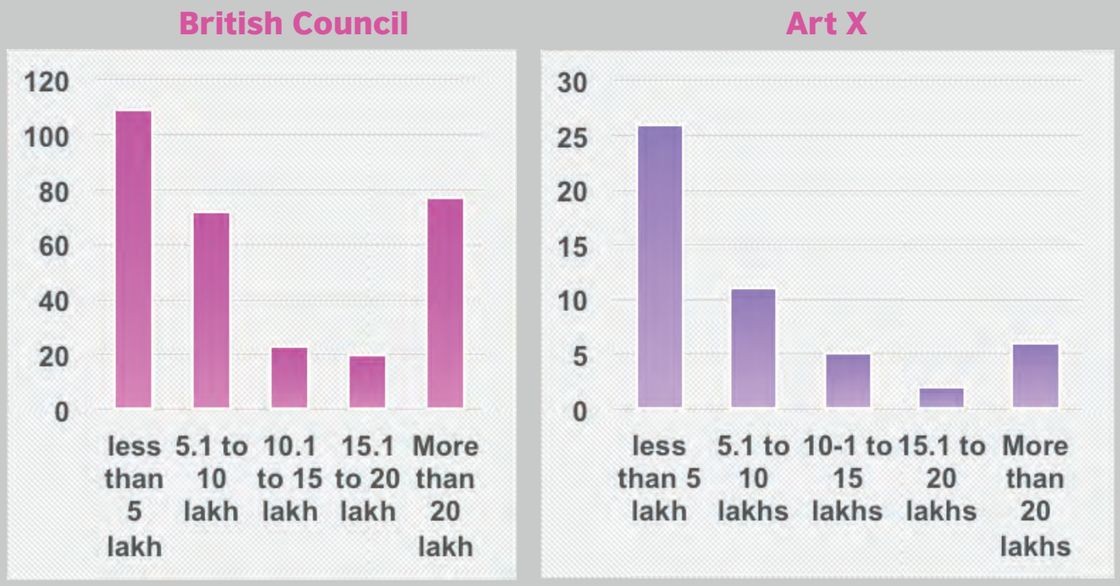
Graph 25: Events cancelled comparison

British Council: **36%** said that they had to cancel 4-7 events and **34%** said they had to cancel 0-3 events.

Art X: **38%** said they have cancelled 4-7 projects until the end of October 2020, another **36%** said 0-3.

Commonality: In both cases more than 1/3rd of the respondents had to cancel 0-3 events. Another 1/3rd had to cancel 4-7 events.

How much financial loss have you estimated / already incurred due the pandemic? (in INR)



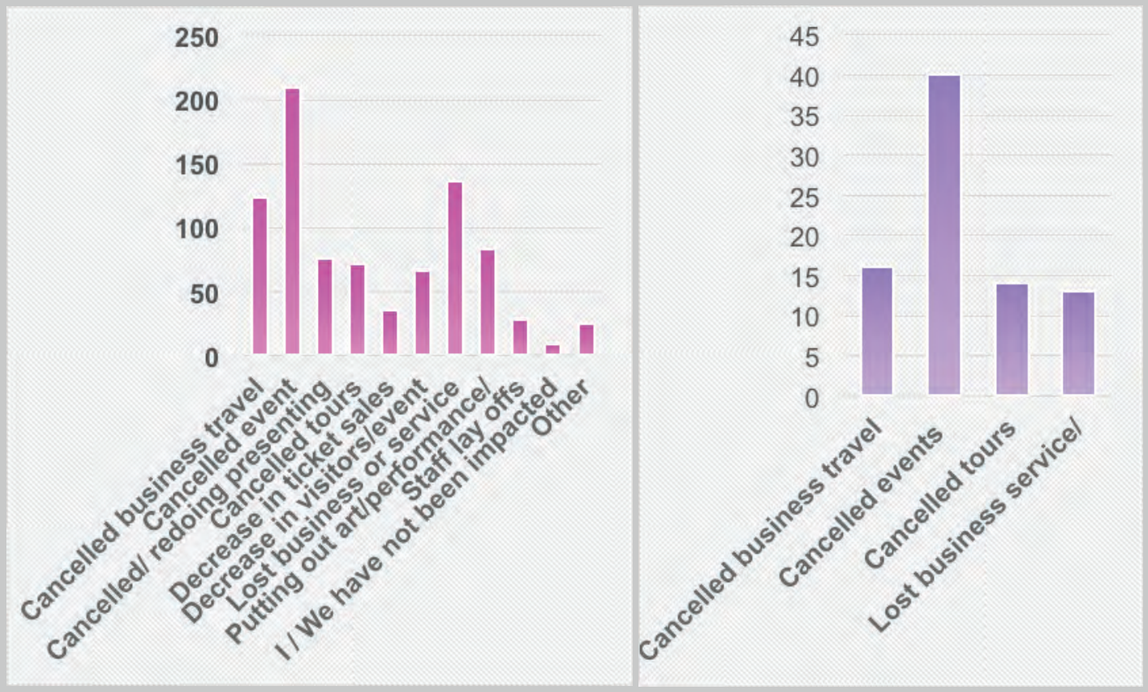
Graph 26: events cancelled comparison

British Council: In terms of financial loss incurred **9% said 15.1 to 20 lakh**, **32% said 5.1 to 10 lakhs**,**10% said 10.1 to 15 Lakh** and **49% said less than 5 lakhs**.

Art X: In terms of financial loss **12% said more than 20 Lakhs 52% said less than 5 Lakhs.**

Commonality: In both cases the financial loss was between **0-5 Lakhs for around 50% of the respondents**

In what ways have you / your organisation been impacted?



Graph 27: events cancelled comparison

British Council: Organisations have been impacted in different ways: The highest impact has been in terms of cancellation of events **(24%)** and cancellation of business travels by **14%**. **10%** have been impacted by not being able to put out art performance content. **16%** have lost business or service contracts.

Art X: **48% said impact has been due to event cancellation** while the rest of the data is divided between business travel, cancellation of tours and loss of business service contracts equally.

Commonality: The respondents from Art X reported much greater cancellation of events which corelates to the greater number of individuals and freelancers in its data set.

Case Study: Kerala Government support for Artists

About the Programme

Announcement of two-month financial aid
for artists by Kerala Government

Situation pre-Covid-19

The Department, Directorate of Culture, under the State Government, was formed to preserve and promote Kerala's unique culture. Several cultural institutions function under the umbrella of this department. These include research institutions, institutes, academies including those named after luminaries in various fields, 'bhavans', and the Kerala Kalamandalam.

The Department supports various projects to carry out its mission, and actively recognises exceptional work done by other creative institutions and artists through a number of awards and prizes. The scope of its work extends from wide-ranging activities like the preservation and protection of Kerala's heritage, history and ancient monuments; and the promotion of the indigenous performing arts; to the observation of culturally significant days, as well as days dedicated to those who have made outstanding contributions to the cultural ethos of the State.

The Directorate of Culture mission is committed to ***"strengthening the functions and activities of cultural institutions by bringing them in right direction and giving them timely assistance and guidance whenever or wherever needed for fulfilling their commitments in this scenario."***

The impact of Covid-19

As the world is dealing the Covid-19 pandemic, the steps taken by Kerala to prevent its spread have been widely recognised as exemplary in India. The state government's measures taken are acknowledged to have minimised the impact of the virus nationally.

But, the economic damage Covid-19 has inflicted on the finances of the state is forecast to be huge. Tourism, is one of the biggest markets, contributing about 10% of the state's economy. Tourism has come to a halt. In the field of creative arts hundreds of daily wage earners in the film industry; along with those associated with festival economies like caterers, artists, event management companies have been hugely impacted.

Rudra Sensarma, economist and dean, IIM-Kozhikode, says, ***"Unfortunately Kerala's economy is mainly dependent on two types of inflows -- travellers and remittances. While tourism sector has already been severely hit by the Covid-19 pandemic, I expect even remittances to slow down as the global economy goes into a recession. Therefore, the economic impact in Kerala is expected to be the most severe among all the Indian states."***

The Government's response to the current situation

Kerala Government's Department of Cultural Affairs have announced a two-month financial aid of INR 1000 for artists struggling during the lockdown.

Innovations made to build strength and resilience

The application for Covid-19 Distress Relief assistance to artists of different art forms and craftspeople of various crafts can be made through Kerala Lalithakala Academy, Kerala Sahitya Academy, Kerala Folklore Academy, Kerala Chalachitra Academy and the Kerala Sangeetha Nataka Academy. Further details regarding the procedure of application had been published on respective websites.

Artists based in Kerala and working in films, televisions are eligible to apply for this assistance through the website www.keralafilm.com.

Folk artists who have been in the field for 10 years or more can apply for financial aid of Rs 1000 by visiting www.keralafolkloreacademy.com or by sending an e-mail to keralafolkloreacademy@gmail.com.

Finance & the how programme aims to impact income for the Creative Industries

The programme aims to provide interim emergency relief to artists in distress in Kerala

Individual stories of change

In these difficult times artists have not only been recipients of relief but have also extended their support. Saji and his daughter Gayathri Saji from Aroor are busy creating new paintings during the lockdown period. Both the father and daughter are mural painting artists and they hope to sell their paintings after the lockdown and donate the money they receive to the Chief Ministers Relief Fund. While the shortage of canvases and colours is troubling them, they are hoping to contribute a reasonable amount to the fund.

Learning from the programme especially regarding sustainability

The long-term mandate of the Department of Cultural Affairs, Kerala Government has been to preserve and promote all forms of arts and culture emphasising the cultural heritage of the state.

The Directorate prioritised distribution of financial assistance or award amount to people of arts and letters, pension to local artists, showcased renowned artists and writers and enabled employees of various cultural institutions and academies.

Besides, financial assistance it has also extended to artists for medical treatment.

The Directorate of culture also serves as an agency of the State Government to distribute recurring and non-recurring grants to eligible cultural establishments and agencies including JawaharBalabhavans that foster, promote and disseminate the cultural heritage, knowledge and the distinctive features of traditional and contemporary art forms of Kerala within and outside the country.

The directorate in continuation of this tradition has designed this interim support.

https://www.onmanorama.com/news/kerala/2020/04/29/kerala-lockdown-essential-useful-news-transport-sector-workers-aid-prasanthi-elderly.html

Case Study: STAYin aLIVE

About the Programme

StayIN aLIVE is a long-term, sustainable platform for artists to nurture, strengthen, and support each other. It is a collaborative effort that aims to give back to the live arts and performance industry in a time of great need, and hopes to create a movement of self-sufficiency within the industry.

StayIN aLIVE was initiated by a group of individuals and organisations who share a common belief - arts are essential to human life. The collective comprises Art X Company, Alok Parande, Artist Aadmi, Big Bang Music, Gully Gang, Kommune, KWAN, OML Entertainment, Paytm Insider, Priyanka Khimani, Shark&Ink, Tabhrasa, Tarsame Mittal Talent Management, Tape A Tale, Unmute, and Women of India.

Situation pre-Covid-19

India's cultural sector is not recognised as a single sector, and neither does it have a coherent or unitary culture policy. While a post-independence India saw major state support for culture that included infrastructure and institution building, a post-liberalised India saw a growing marginalisation of the nature of state involvement in culture and the growth of for-profit creative sectors broadly termed under 'Media & Entertainment'. (Ref – page https://www.academia.edu/8466234/International_Database_of_Cultural_Policies_Country_Profile_INDIA). As pointed out in the India culture policy profile by Ashish Rajyadhaksha, Raghu Tenkayala and P Radhika, 'state-sponsored culture – of the kind that might be promoted by Indian embassies abroad, or the cultural festivals organised domestically – would gradually lose its credibility, in comparison to other independent, market-driven, community-driven or even corporate initiatives.' What this resulted in was an emergence of an independent culture sector, without a coherent policy framework to guide its protection, growth and evolution. Thus, the culture sector, comprising a range of individual and self-employed cultural professionals, micro, small and medium enterprises and a few larger cultural organisations and venues is dealt with a mean double hand. On one side, the sector growth in a relatively unorganised and informal space and is regulated by general laws not particularly suited to its growth and protection. There are few unions and associations to act as buffers and a lack of advocacy groups to advocate for policy-level change. On the other side, its stakeholders are rendered vulnerable to major or minor shifts in the socio-political-economic landscapes, including but not limited to demonetisation, GST and a major health pandemic.

The impact of Covid-19

As the Government of India imposed a strict lockdown on March 23 over fears of the health, many cultural events, festivals and arts organisations were significantly impacted through mounting cancellations and venue closures. As reported by EEMA, the events industry was to take ₹1 trillion hit. It was in these early days of the lockdown when a few arts and media organisations came together to face the COVID-19 crisis and its impact on the live arts space. Over several brainstorming sessions led by Roshan Abbas, MD, Geometry Global and Founder, Kommune, a performance arts collective, the group decided to launch the initiative StayIN aLIVE, to bring together artistes to support one another and people affected by the ongoing pandemic.

The Platform's response to the current situation

The stayIN aLIVE initiative aims to build support for the gig workers in the performing arts economy and stands on three legs, 'educate, inspire and support'. Under the 'educate' leg, the platform plans share knowledge with artistes about ways they can make money online by conducting webinars, seminars and more, through 'pay as you go' models. It also aims to educate them about their mental health. The second leg 'inspire' will make use of existing social media platforms like Facebook, Instagram, YouTube, TikTok, etc, to collaborate with these artistes, giving them a great audience reach and allowing a two-way communication.

The third and the last leg is 'support', which is essentially a call for funds. The money collected will be disbursed to help gig economy workers through the establishment of an artist emergency fund. The first set of beneficiaries for this fund were to be artists.

Innovations made to build strength & resilience

Clear vision: The initiative aims to educate, inspire and support artists. And to cultivate best practices, encourage thought leadership and become a compassionate, yet impactful and sustained, voice of advocacy for government policies related to the live arts industry.

Campaign development:
stayIN aLIVE first decided to adapt to the new realities through a campaign titled #StageBadlega (the stage is changing). The 'stage' is no longer the wood panelled, sprawling space with clear entry/ exit points and synchronised lighting. It is now a soothing cosy corner of the library or a neatly organised living room dotted with personal photos. stayIN aLIVE decided to move to the digital platform as a new stage for its activities.

Online arts festival: Using the above thought as a trigger, the initiative launched its first event on 16th May 2020 with over 60 artists, 24 hours of non-stop content, across multiple platforms and raised over INR 3 lakhs in ticketing fees and donations via a campaign fundraising page. Since June 15, weekend events have been started which are raising ticketing revenue, to be pooled back into the 'support' section. These events tap into the 'educate' and 'inspire' legs of the campaign. **https://stayinalive.giveindia.org**

StayIN aLIVE Artist Emergency Fund (SAAEF): On June 8, The StayIN aLIVE Artist Emergency Fund (SAAEF) was launched. SAAEF has been created to alleviate severe financial challenges faced by artists in the Live entertainment sector due to the COVID-19 crisis. The Pandemic has put a stop to several major projects and cultural events, leading to a total paralysis of the industry. Among the most vulnerable and affected community is that of the artists. In order to support artists' tide over this period, stayIN aLIVE has created a 'personal emergency fund' aimed at addressing specific financial challenges and as a stop-gap measure. The type of grants will range from small cash grants, reimbursement for a certain class of urgent expenses (such as rent, important bills) and utility payments to third parties, and will be limited to INR 20,000 per applicant per cycle. SAAEF will supply funding to cover unexpected expenses directly resulting from the COVID-19 crisis. This includes the following categories of needs: loss of employment, lack of financial resources, accidents and poor health.

Case Study: STAYin aLIVE

Finance & how the Platform aims to impact income for the Creative Industries

In the short team, stayIN aLIVE will continue to raise funds to support artists who are in dire need of it. In the long term, the aim is two-fold:

a) Represent the freelance artist as a collective voice to share best practices, knowledge across subjects, advocate with the Government where needed and impact policy introduction and/or change

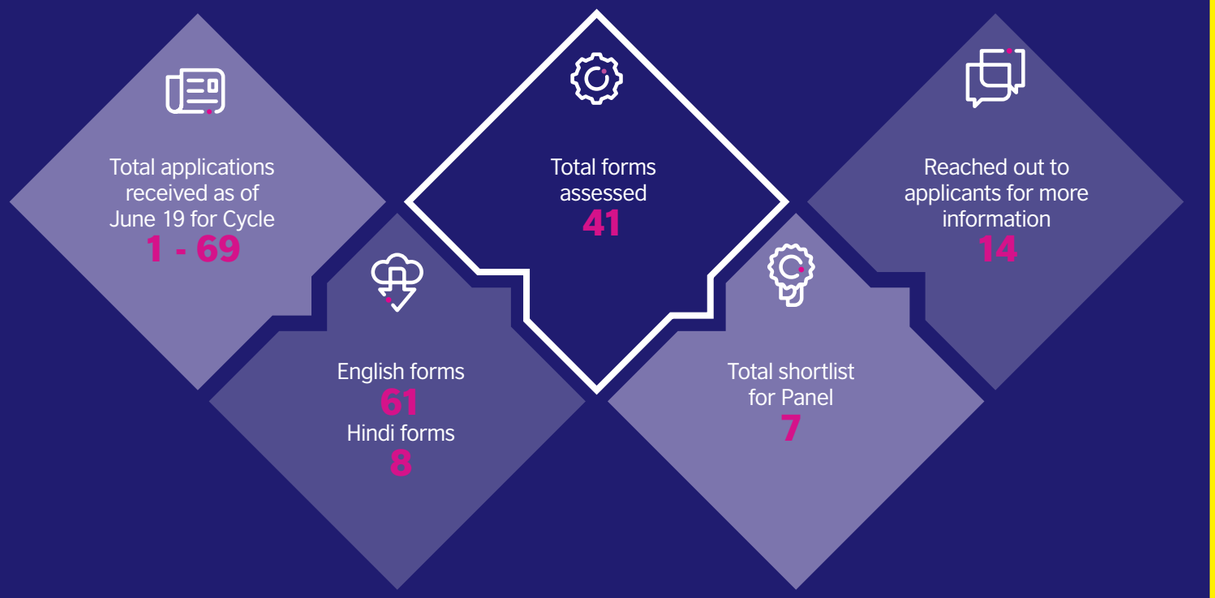
b) Help artists financially either through short team fund disbursement (ongoing) and create opportunities for sustainable income by means of listing and sourcing such opportunities

Key data

stayIN aLIVE's events will continue to cover a range of performing arts through regular digital events and performances, encompassing the aspects of Educate, Inspire and Support. Industry experts will cover all aspects of being an artist – legal, financial, mental, emotional, physical.

Each cycle for application is opened for 10 days and the applications are reviewed by the Fund administrator and panel of experts at StayIN aLIVE.

A panel of experts drawn from the arts and creative sectors, academic, legal and social impact disciplines, and organisations that are collaborating on StayIN aLIVE, assess applications which will be accepted in at least two languages to ensure that artists from a wide variety of socio economic classes can apply.



Challenges

One of the key challenges faced while putting together this initiative is that all organisations were working pro-bono on the campaign. This was being done alongside these organisations navigating though the challenges presented by the pandemic within their own business models. This made it difficult for organisations in the collective to balance varied uncertainties while still building a structured approach for development of activities.

As organisations within the for-profit space and limited mandates to build not-for-profit endeavours, the collective initially struggled to consider all the nuances of raising money and putting a fund. For instance, the collective had never put a fund together and initially struggled with nuances of evaluation on eligibility and assessment of candidates while maintaining the crucial intangible balance around sensitivity and care in responding to the applicants. Support and guidance from organisations such as Indian Foundation for the Arts and the British Council helped navigate some of the challenges.

Another major challenge faced was the perceived privilege of the network of artists that stayIN aLIVE had access to, which made it difficult for raising funds towards their support. A common refrain was, 'but the folk and vernacular artiste is struggling so much more.' There's a case to be made for different initiatives that support different needs of the cultural community.

While stayIN aLIVE aims to target gig workers that include artist and creative professionals, it had to operate on a Minimum Viable Product (MVP) model, which focused on starting small and building scale while strengthening the model as we go along. Morally, these seemed to be a difficult decision to take and something that the collective struggled with.

Learning from the programme especially regarding sustainability

While on the one hand, the impact of the arts in helping humanity get through the pandemic and the resulting lockdown through its music, dance, art and literature, cannot be denied, on the other, surveys declaring that 'an artist' is one of the most useless professions continue to make our job difficult to carve a voice for this community amidst major policy maneuvers. Advocacy for the culture sector is one of the biggest learnings that we have had and will continue to bring in into our work.

With few government initiatives to support artists and freelancers who are most vulnerable in these times, we learned that self-organizing and forming collectives is an urgent step we need to take to buffer us from future shocks of this sort. A formal not-for-profit organisation or an association with a clear mandate to provide emergency funds and support during major global crises is the need of the hour.

Case Study: STAYin aLIVE

Scope to emulate & recommendations

It's imperative for the culture sector to self-organise and advocate for its growth and support.
We recommend that:

- Associations and membership-based organisations be created country-wide that support varied groups within the sector (artists, technicians, arts managers and so on).
- Data and research on impact of COVID-19 on the culture sector.
- Advocacy around support for the growth of the sector to prevent its complete deterioration.
- Information on all available funding sources and support possibilities for the culture sector from all State Governments and the Ministry of Culture in New Delhi.
- A whitepaper outlining policy-based support and relief for the culture sector.
- Publically accessible resources on how to build an association, and develop and disburse a grant.

Weblinks

http://stayinalive.in
https://stayinalive.giveindia.org

https://www.livemint.com/industry/media/coronavirus-indi-an-events-and-exhibition-sector-to-take-rs-1-trillion-hit-11585564755584.html

Sources for the above definition:
Employment Laws In A GIG Economy. In: The SCC Online; Author: Auroshree; Published: 12 October 2018. Accessed: 18 March 2020

Home-based work in India. In: paycheck.in; Author: Unknown; Published: Unknown. Accessed: 18 March 2020.

Gig workers set to come under labour laws. In: rediff.com; Author: Somesh Jha & Neha Alawadhi; Published: 26 September, 2019. Accessed: 18 March 2020



Literature review summary

Pre Covid-19 Context

The Indian arts industry has grown over the last few years by 17% and it holds great potential in terms of its impact on the Indian economy, direct contributions to employment, skills development, supporting high-value ancillary industries.

Concerns on the nature of the industry
In the last 4 years the Ministry of Culture, Government of India budget for culture was:

Financial Year	INR (Crores)
2016-2017	**2302.5539**
2017-2018	**2530.5049**
2018-2029	**2602.1851**
2019-2020 (pre-audit estimate)	**2647.0000**
2020-2021 (estimate)	**3149.8600**

The current context
More than 80% of UNESCO World Heritage properties have closed, threatening the livelihoods of the local communities and cultural professionals along with impacting sense of community and cultural lives of people.

The Events and Entertainment Management Association (EEMA) [6]
Around **52.91% of companies resulted in 90% of their business being cancelled** between March-July 2020

63.1% companies i.e. around 107 companies suffered from a revenue loss of up to 1CR

World Economic Forum Reports on how Covid-19 is affecting the Music industry
The crisis is likely to accelerate underlying trends in the music industry, based on the importance of streaming, which has grown from **9%** to **47%** of total industry revenues in just six years.

Connecting online and coming together
In India **94% of music is consumed on mobile and digital platforms**, with **34% digital penetration of the population and 500 million subscribers on Jio Digital Mobile phones** in 3 years since launch.

In summary
Covid-19 started at a time of increasing global economic vulnerability with concerns about falling consumption, investment and employment. Some of the largest economies stand on the precipice of the greatest recession in the last 100 years. EEMA has forecast industry losses of **30 billion.**

There will be significant change in the way the industry will think, create and collaborate. Greater technical integration, process efficiencies, remote collaboration for creative ideation will alter the way the industry creates content. **[10]**

Sectors traditionally reliant on face to face engagement with audience (Cinemas, Museums, Galleries, Theatres) will take much longer to recover from the pandemic as behaviour takes longer to revert from the extended experience of social distancing and lockdown.

There will be significant change in the way the industry will **think**, **create** and **collaborate**.

Part 3

Covid-19 resources for the Indian creative sector

Arts & Resources Culture India
https://www.indiacultureacri.in/covid-19

Online news and networking - 54.5k members
https://www.facebook.com/groups/Arts.Culture.Resources.India/

Current India and global Creative Economy research

India

Confederation of Indian Industry
https://cii.in/CII_Research.aspx?enc=prvePUj2bdMtgTmvPwvisY-H+5EnGjyGXO9hLECvTuNuFr+MvvKrnCVSovyliJiXdb09ppLKHymKh6yTfQD1FwQ==

International Database of Cultural Policies: Country Profile: India
https://www.academia.edu/8466234/International_Database_of_Cultural_Policies_Country_Profile_INDIA

Reimagining India's Museums for the 21st Century
https://in.usembassy.gov/all-india-museum-summit-2019-indias-museums-in-the-new-millennium/

Global

Culture 360 – World Economic Forum Reports on how Covid-19 is affecting the Music industry
https://culture360.asef.org/news-events/world-economic-forum-explores-how-covid-19-affecting-music-industry/

KEA EU wide cultural sector Covid-19 report
https://keanet.eu/a-short-analysis-on-national-covid-19-support-measures-for-the-ccs-in-the-eu/

Cultural Policy Covid-19 comparative report
https://www.culturalpolicies.net/covid-19/comparative-overview-reopening/

UK

Creative Industries Federation Covid-19 Report
https://www.creativeindustriesfederation.com/sites/default/-files/inline-images/The%20Projected%20Economic%20Impact%20of%20Covid-19%20on%20the%20Creative%20Industries%20Report%20-%20Creative%20Industries%20Federation%202020.pdf

Heva Fund Covid-19 Report
http://www.hevafund.com/news/2020/5/5/covid-19-resilience-creative-industry-options-and-strategies

33 different sector research projects live in the UK related to Covid-19 **Creative Industries Policy and Evidence Centre** https://pec.ac.uk/blog/cultural-consumption



Part 4

Research methodology

In response to the Covid-19 pandemic the British Council India in partnership with FICCI and the Art X Company launched the Taking the Temperature survey. The survey is aimed at creative professionals, arts companies, sector support organisations, policymakers and funders.

The survey link along with relevant information was circulated amongst 9500 data sets. The link was live from 15 May to 12 June 2020. 368 surveys have been completed up to 12 June across (318) the British Council and the (50) Art X Company.

The report has been peer reviewed by Ian Thomas (Head of Evidence, Arts); Anvesha Khandewal (Head of Research, Monitoring & Evaluation, India) British Council; Rashmi Dhanwani (Managing Director) The Art X company and Vikash Kumar FICCI.

Hindi, Tamil and Bangla language translation of the survey undertaken by the Craft Revival Trust.

The data received cuts across sectors as the survey has reached out to advertising, architecture, visual arts including painting illustrations, photography, sculpture, public and street art, design, films or video, literature and publishing, performing arts, new media arts including gaming craft. venues including theatre, cinema, gallery, park. The data represents further diversity in terms of its geographical representation with 67% of the respondents being present on a national scale.

The survey in its scope sought to understand the immediate impact on artists livelihoods, arts organisations and their audiences, strategic response by governments, NGO's and major stakeholders to ensure the sector survives, recovers, sustains and grows. It aims to identify conditioning factors which will ensure the sector remains resilient, responsive and relevant and finally evidentially reflects on how the arts and creative sector may look like in the long-term and how Government interventions could support their sustainability. In terms of presentation and analysis the data has been recorded and analysed to document what's happening in the sector. It includes presentation of British Council data, Art X data separately and also presents commonalities between data points. We have also included case studies of resilience in action across the creative economy sector. The case studies provide glimpses of initiatives taken by both the private as well as the Government sector.

The Secondary research provides backdrop to the context prevailing in the art sector and for that we have drawn on market insight from research and reports from counterpart organisations.

In terms of overall methodology, the survey will be conducted every 3 months for 3 times and present both the changing and emerging trends. From the next time around it will also be conducted in **Hindi, Bangla, Malayalam, Telugu, Kannada** and **Tamil**.

The data and analysis in this report is General Data Protection Regulation (GDPR) compliant to ensure confidentiality of commercially sensitive research findings.

Part 5

Annexures

Literature Review

A. Pre Covid-19 Global Context

1. Art and Culture: - the thread of resilience

- Arts and culture are now more than ever the thread of resilience that binds us in one fabric.

- The creative and cultural industries (CCIs) are one of the fastest growing economic sectors in the world. In many countries they are growing at double the rate for the economy.

- In the UK they contributed £101.7 billion to the economy, that is £11.5 million an hour in 2018 (DCMS, 2017). They generate quality jobs faster than any other sector. Global figures from United Nations tell us that in 2015 they contributed US$2,250 billion to the global economy and employed almost 30 million people. [1]

- The Indian arts industry has grown over the last few years exponentially and it holds great potential in terms of its impact on the Indian economy, direct contributions to employment, skills development, supporting high-value ancillary industries.

- Apart from their economic worth CCIs are more than economic generators and play fundamental role in building our sense of culture, identity and values beyond the commercial.

2. Concerns on the nature of the industry

In the last 4 years the Ministry of Culture, Government of India budget for culture was

Financial Year	INR (Crores)
2016-2017	**2302.5539**
2017-2018	**2530.5049**
2018-2029	**2602.1851**
2019-2020 (pre-audit estimate)	**2647.0000**
2020-2021 (estimate)	**3149.8600**

Table 3: Budget allocation for Culture

Nature of the Industry
India's cultural sector is not recognised as a single sector. In the absence of a central culture policy, operations within the sector still span across the spectrum of the arms-length funding model and the reliance on the market model. Mandates for regulation are further fragmented into existing structures within the Indian economy. As a result, there are no systems to cohere the vast range of practices and professionals working in this space. Most initiatives are driven by the passion of individuals and non-profit organisations, who struggle to maintain themselves and the organisations they run. This has led to several barriers to growth for the sector – both ideological and economic which include:

- In the crafts sector artisans – the structures they come from draw upon community heritage for their teaching and making of art. The handicrafts sector benefits from a mix of government policy and not-for profit sector intervention which gives access to markets both as localised communities and individuals.

- Independents artists and creatives from more urban and contemporary art contexts tend to work as individuals or small collectives and groups (e.g. bands, dance troupes for example). They are less likely to have institutional alliances unlike West (ballet dancers at the Royal Ballet or musicians in orchestras such as the LSO). In India the lack of formal structures forces artists to work independently as they do not have access to large organisations who, through their business structures and policies, can also serve as safety nets

- Formal (Trade Unions and Management bodies) and Informal (sector collectives and consortia) are few. In the former this mitigates against a collective approach for protection of employment rights for Workforce; and the later impedes the ability to pool resources and expertise to speak with one voice.

Industry workforce
Broadly, Indian employment statutes recognise two categories of workforce: 1) workmen and 2) non-workmen. Typically, labour legislations pertaining to bonus, minimum wages, provident funds and so forth are only applicable to such workmen and typically not non-workmen (i.e. not freelancers).

The inclusion or exclusion of freelancers and consultants within the workforce framework of such labour legislations has always been a moot point and has been analysed by the judiciary on a case-by-case basis. Such uncertainty puts freelance artists and independent creative professionals in a precarious position and makes them vulnerable to economic slow-downs and recessions.

Sources for the workforce definitions:
- Employment Laws In A GIG Economy. In: The SCC Online; Author: Auroshree; Published: 12 October 2018. Accessed: 18 March 2020

- Home-based work in India. In: Paycheck.in; Author: Unknown; Published: Unknown. Accessed: 18 March 2020.

- Gig workers set to come under labour laws. In: Rediff.com; Author: Somesh Jha & Neha Alawadhi; Published: 26 September, 2019. Accessed: 18 March 2020

3. Sector snapshots
Crafts
- Lack of authentic and adequate data on crafts personnel, including their livelihood conditions, families' details, and socioeconomic status is a major bottleneck that affects planning and policymaking for the sub-sector. Artisans are dependent on middlemen and trader entrepreneurs to sell their products. [2]

Visual arts
- The Indian art market has seen collectors becoming more knowledgeable of art and aware of their own tastes. Also, while the industry has showcased growth during the last four years, its share in the global art industry stood at a miniscule 0.5 per cent in 2016. However, with Indian art finding more suitors in the domestic as well as international markets, the industry holds massive potential for growth and could become a sought-after art hub globally. [3]

Music
- The organisation that represents the recorded music industry in India, in its Digital Music Study 2019, examined the ways in which music consumers aged 16 - 64 engage with recorded music in India. Report highlights most people (80%) identify as 'loving' or being 'fanatical' about music, much higher than the global average of 54%. Copyright infringement remains a challenge for the music ecosystem. 67% of all surveyed used unlicensed methods to listen to or obtain music in the past month, while 63% used illegal stream-ripping services. Thanks to cheap data and smartphone penetration music consumption in India is growing regionally. The growth rate will be higher in the regional segment due to a low smartphone base. [4]

B. The current context
The health crisis brought on by the novel coronavirus has been unprecedented in its impact on lives, livelihoods, and our socio-economic cultural situation. While people around the world turn to culture as a source of comfort and connection, the impact of Covid-19 has not spared the culture sector:

• More than 80% of UNESCO World Heritage properties have closed, threatening the livelihoods of the local communities and cultural professionals along with impacting sense of community and cultural lives of people. ***(Building Resilient Communities Practicing Intangible Cultural Heritage)***

• Artists across the world, most of whom were already working part-time, on an informal basis or under precarious contracts are struggling to make ends meet.

• Another fall out is the large numbers of artists, technicians, sessions musicians being rendered unemployed with the closure of film production, live events, F&B sector.

GDP figures released in May 2020, show India's economy slowing to a 40-quarter low of 3.1% (y/y) in Q4 of FY2019-20 (Jan-Mar 2020).. On an annual basis - both exports and imports have sharply contracted in 2019-20, by 0.6 and 3.8% respectively. The economy was already slowing sharply before Covid-19, but significant downward revisions to GDP growth in previous quarters imply the slowdown was more pronounced that previously thought. The downward revisions have been mainly due to lower growth estimates for the following sectors - trade, hotels, transport and communications, financial services, and real estate. **(Information extracted FCO 1 June email)**

C. Recent surveys
1. In order to evaluate the impact of Covid-19 worldwide, last April, **the International Exchange for The Performing Arts (CINARS)**, [5] launched a survey among thousands of professionals throughout the world. CINAR received **844 responses, including 737 complete ones,** hailing from **45 countries** spread over **5 continents**, which give a snapshot of the impressions and expectations of the profession at large. Among the respondents, 40.3% are **creation companies**, 37% are **international programmers**, and 18% **are artist representatives. Results indicate:**
• **international activities in 2020** have been **postponed** (38,1%) or **cancelled** (39,9%).

• despite the tireless efforts by show presenters, cancellations in 2020 are bound to increase, given how the situation is evolving

• **60,8% of those polled expected the recovery of their normal international activities to take place by the summer of 2021.**

2. The Events and Entertainment Management Association (EEMA) [6] recently conducted a member survey with 170 companies that were affected by COVID-19.. Some of the key findings of the report:

• around 52.91% of companies resulted in 90% of their business being cancelled between March-July 2020

• 63.1% companies i.e. around 107 companies suffered from a revenue loss of up to 1CR

• around 7 companies envisage a 50%-80% retrenchment of their current workforce and 35 between 25%-50%

• the ideal working capital/loan expected to keep afloat for the next 6 months is around 2-5 CR for 39 companies and 1-2 CR for 118 companies

• around 97 companies will need to raise capital or debt from institutions or shareholders, VC funding etc.

3. World Economic Forum Reports on how Covid-19 is affecting the Music industry

• The music industry has been hit hard by coronavirus with live performance revenue the biggest casualty. A six-month shutdown is estimated to cost the industry more than $10bn in sponsorships, with longer delays being even more devastating.

• The industry is fighting back with new ways to monetize music consumption and innovative models: Fortnite hosted a live rap concert that attracted nearly 30 million live viewers.

• The crisis is likely to accelerate underlying trends in the music industry, based on the importance of streaming, which has grown from 9% to 47% of total industry revenues in just six years.

• Recently reported in UK Parliamentary questions, it takes over 7,500+ downloads to earn equivalent of 1 hour's minimum wage. The music sector therefore has become increasingly reliant on live performance in venues and the festivals circuit.

D. Connecting online and coming together

• Amid this global emergency, arts and culture continue to adapt to sustain for entertainment and more profoundly as repositories of histories and human connection. The surveys conducted demonstrate the demand and need within international culture networks to keep programming and creating.

• Technology has provided a platform for artists and audiences to meet and share online. While income generated from online platforms is minimal and unreliable as a replacement for lost ticket income and sales over the long-term

• In India 94% of music is consumed on mobile and digital platforms, with 34% digital penetration of the population and 500 million subscribers on Jio Digital Mobile phones in 3 years since launch. ***(1. Nielsen Music Report 2018 and 2. OTT Video Future Trends (Red Star Consultancy)***

• While the increase in digital opportunities may reach plateau or saturation point for some audiences online and is not a suitable alternative for many arts audiences.

Digital platforms are being used for in manifold ways: Some examples include:

The Jaipur Literature Festival has developed an online property of author dialogues, Brave New World brings together journalists, novelists and academics from arts, science, economics, faith, et al to discuss and share concerns of the day. Since the launching the first 50 editions have reached over 1 million viewers online. However, all activity is freely available online in the spirit of JLF but with minimal income generation toward the digital festival.

With the well-being of his grandparents on his mind, Shanghai-born Duyi Han, 25, a designer based in Los Angeles and New York, began to paint the medical workers in their white protective suits, gloves and masks, the leading fighters of the global war against the deadly coronavirus, in oil on canvas and digital images. His new body of work, The Saints Wear White, has gone viral on social media and shows medical workers as central protagonists in the frescos and traditional paintings that adorn church walls. They are a far cry from their usual colourful biblical themes. [7]

Kuchipudi dancer and founder of Natya Taringini Performing Arts Centre Kaushalya Reddy has shifted her dance training classroom to the virtual world. In adapting her training to online she is readily able to track the mudras, leg movements and arm gestures better by recording them. A further advantage from the archive of recordings enables students and teachers to refer back the lessons after the live class. [8]

E. Creativity takes courage during Covid-19

Art is a universal language that crosses borders, which can be used to express pain, suffering and the damage that this pandemic has brought to people all over the world. And today it is the artists themselves who are staring at the gaping chasm between the haves and the have-nots, even within the community. The lack of work and deteriorating financial situation compelled artistes to take extreme steps. In rural India, families are dependent on the arts and crafts as primary means of livelihood, and as a secondary mode of income, especially in the agrarian communities. Like the Adivasis in Odisha's Sadeibareni village who make and sell dokra (bell metal) art in between the two paddy-harvest seasons. The craftspeople don't fit into the MSME category, they are out of the security blanket, have no salaries, provident funds, or insurance. Dastkar founder Laila Tyabji says her findings estimate about 200 million people including the craftsperson's families and ancillary workers who are in dire straits. **[9]**

F. In summary

• Covid-19 started at a time of increasing global economic vulnerability with concerns about falling consumption, investment and employment. Some of the largest economies stand on the precipice of the greatest recession in the last 100 years. EEMA has forecast industry losses of 30 billion.

• Arts and culture will need to respond to continue to contribute to promoting equality and inclusion for diverse artists and audiences most at risk. Organisation will need to manage financial risk and innovate business models to emerge stronger.

• Digital media businesses have fared relatively better, especially on the consumer side. Digital consumption has seen rapid growth in India is this is likely to accelerate materially during and beyond Covid-19.

• There is likely to be long term shift in the integration of digital tools with media and entertainment sectors the immediate beneficiaries. This may not be equally consumed across socio economic groups and the digital divide may deepen in developing economies as a direct consequence of Covid-19.

• There will be significant change in the way the industry will think, create and collaborate. Greater technical integration, process efficiencies, remote collaboration for creative ideation will alter the way the industry creates content. **[10]**

• Sectors traditionally reliant on face to face engagement with audience (Cinemas, Museums, Galleries, Theatres) will take much longer to recover from the pandemic as behaviour takes longer to revert from the extended experience of social distancing and lockdown.

References and acknowledgements: The literature summary provides a snapshot of the ways in which the creative industry was positioned prior to the pandemic. This summary is based on reading from research, academic reports and articles in each footnote.

[1] Creative and Cultural Industries in Srilanka, 2016

[2] Creative arts in India, Theatre, dance and crafts industry, 01 December 2016. FICCI

[3] COVID-19: The many shades of a crisis - A media and entertainment perspective - KPMG Report

[4] *https://www.business-standard.com/article/news-ani/imi-releases-indian-music-industry-2019-a-national-snapshot-of-music-engagement-119092500884_1.html*

[5] *arts@cinars.org*

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[7] *https://radiichina.com/duyi-han-hubei-medical-workers-murals*

[8] *https://indianexpress.com/article/lifestyle/art-and-culture/artists-from-across-the-world-on-how-the-coronavirus-crisis-is-shaping-their-work-6355907/*

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