


Festival Goers – Framing audiences against the dynamics of pre and post-COVID engagement

Rashmi Dhanwani, Mumbai - India

Concert grounds and arenas teeming with thousands of arts lovers, music aficionados and festival goers before March 2020 seemed to be the norm. There are very few sectors that have been hit as hard as the cultural and creative sectors, with festivals being most affected. With social distancing rules in place, nearly 100% of the festivals in most of the countries in the world were cancelled between March-October 2020 – ranging from Cannes Film Festival in France, Mawazine in Morocco, Sydney Writes Festival, Hong Kong Arts Festival, Art Basel Miami, and the Mahinda Blues Festival in India. The past year also witnessed a massive migration of live events to online and hybrid forms. Some 44% of the largest [114 film festivals were held online](#), while an additional 25% took place partly online. The art market also shifted online, with an overall [22% drop in global art sales](#).

Festivals, that had both the aesthetic ability (film and literary festivals), technological capability and the video archive to put recorded content on the web and create collaborations with other festivals, did move to acquire and engage audiences online. On the other hand, festivals in a few other countries with varying severity of cases and infection waves, had to adapt to further uncertainty with repeated closures owing to varied health & safety guidelines. This has led to several hybrid models of festival making and showcasing emerging.

Festivals that moved online did so in varied formats. The Sydney Biennale became the first international arts festival to go entirely digital¹, shortly followed by the National Arts Festival—the largest arts festival in Africa.² The NH7 Weekender Music festival in India re-built the festival on an interactive digital platform, and attempted to recreate the festival going experience to suit the needs of a virtual audience, with features such as a photo booth, a mash-up station, private virtual parties, an F&B lounge and an interactive global stage to connect with fellow audiences.³ *We Are One* — A 10 day, global online film festival organised by the Tribeca Enterprises brought 21 leading film festivals, directly in competition against each other in a normal world collaborated to produce the festival together with YouTube. 

¹ Rea, Naomi (2 March 2020). "[Dawn of the Online Biennial Era? The Biennale of Sydney Becomes the First Major International Art Show to Go Virtual](#)". *Artnet*. Archived from the original on 6 April 2020. Retrieved 6 April 2020.

² "[Call for applications: 2020 National Arts Festival digital ideas](#)". *Music in Africa*. 1 April 2020. Retrieved 20 April 2020.

³ TTT

On the other hand, several new platforms emerged to support the showcase of online festivals. the gaming platform hosted the music festival Nether Meant Festival, in April 2020⁴. The festival had over 112,000 unique viewers on the accompanying Twitch stream and raised over \$8,000 for charity Good360 Coronavirus relief fund. Zoom, the video-conferencing platform, was adapted for use by various other arts and culture enterprises. Several other immersive technology platforms emerged to support the new wave of digital cultural events, conferences and education platforms such as Gather Town, Hopin and AirMeet, which have aligned arts and producers' needs to audiences' digital behaviours.

Millions of audiences moved online for cultural consumption and festivals and cultural venues across the world made content free and accessible during the first few months of the lockdown. As per the *COVID-19 Audience Outlook Monitor 2020* released by Australia Council for the Arts, 52% are watching pre-recorded performances and events⁵. The report also noted specific changes in audience behaviour:

- 62% comfortable attending small venues (seating of up to 50) vs 19% comfortable attending large venues (seating of 1000+).
- 96% say venue safety measures will influence attendance decisions.
- Audiences are cautious about buying/booking tickets for future events due to uncertainty about future restrictions.
- Refund and exchange policies will affect future ticket sales.
- 37% audiences are involved in doing arts and culture activities online more frequently than before the pandemic.
- 68% are likely to pay small amounts for digital programs in future.

While relevant, the report above potentially stands true for digital audiences in the global North with its policy support for the cultural and creative sector, wide access to digital infrastructure, and deep digital penetration. In the global South, lack of equitable access and infrastructure, and a particular vulnerability of the culture sector creates significant challenges to the evolution of the audiences to the digital realm. A 2020 survey by McKinsey India, the *Indian consumer sentiment during the coronavirus crisis survey*, has noted a change in behaviour that bears

⁴ <https://www.bandwagon.asia/articles/american-football-headline-nether-meant-minecraft-music-festival-covid-19-relief-efforts-mike-kinsella-open-pit-coronavirus-twitch>

⁵ Ref needed with links

Not so good news:

- 70% drop in entertainment spending in the early phase of the lockdown
- Net intent to spend has decreased by 15% for out-of-home entertainment as compared to spending on entertainment at home which has increased by 30%.
- Major concerns: visiting crowded public places (68%), attending large events (68%) and traveling by public transportation (67%)
- Fear of how to tackle — both economically and mentally — the costs of ‘if’ one gets the virus, also adds to the consumer’s hesitancy to spend on live events.

In light of the above changes, there is a felt need to understand changing audience behaviours in the realm of audience mapping, data analytics, and engagement. We interviewed three arts audience experts from across the world on how to respond to changing audience behaviours and navigate the evolution of the festivals sector in the coming few years.

Jonathan Goodacre, Sr Consultant – International, The Audience Agency – UK

When we think of an arts audience in this new era, what are the questions we should be asking?

The questions remain the same for online and offline audiences. While we need to know who they are, why they are here and what they think about this experience, what’s extremely important for arts managers to ask themselves is what story do we need to tell and what should we be asking our audiences to tell the story. For instance, we are involved with this project in India, festivalsfromindia.com, a portal for all arts and culture festivals in India where we had to devise an audience mapping framework. The questions we asked were: what cultural festivals are there in India? Who attends them currently? Who might attend them and what do Indian cultural festivals need? The story this will tell us will help us shape our understanding of the audiences and what they need?

How important is the question of where audiences are located?

It continues to be very important. Depending who you want to attract to the festival and their connection with the location at the festival, you are seeking to find why they might want to attend the festival and how you can nourish the connection that might draw them to you. But it’s the motivation of the audience, without question, that festival managers need to ask to understand why audiences react or behave in a certain way, particularly at this time.

What is your advice for festivals looking to understand the audience online?

Anu George, Head of Growth, Paytm Insider – India

In terms of analytics, what data should you be looking at to organise your festival online?

It goes back to the questions on what do you need the data for – Questions of programming, ticket pricing strategy or marketing. Most of the data available in India comes from structured data – analytics tools, website data and so on – and unstructured data such as word of mouth, knowing about the sector and the current trends. If you are looking to understand programming, you would look at data about who is coming to the festival – the artist and the audience. For instance, let's assume you are running a music festival – where the sector is relatively more organised, you have ample data available on google trends and artists operate in a digitally mature market. In this case, I would suggest doing surveys, looking at google trends of the artists, location research on what people prefer in which location or city, analytics of artists' audience trends on platforms such as Spotify. This will allow you to understand your artist and their position better in the ecosystem.

And how do you go about using this data to offer experiences for relevant audiences?

You need to design for the audience, particularly if it's a festival that's relying on ticket sales or looking to generate revenue online. You ask two questions: what's the audience's spending power and how do you confirm that? For the former, you look at data proxies such as device information (premium phone users), premium users of platforms such as Youtube premium, Netflix, Spotify etc. This allows you to estimate your ticket price against what the audience is likely to and can afford to pay, and create value-added offerings to incentivise them to attend. Next, it's good to verify the inferences on their spending power, which you can resort to primary data for – sign-ups, open-ended surveys about pricing, and early bird pricing. This would allow you to make informed changes before your programme goes live. Once the event goes live, you can monitor exit and conversion rate. At this stage, you can also iterate on your plan through experiments (such as A/B testing on page content), exit intent surveys, and dynamic pricing.

Lastly, how can you use data to market to audiences?

I probably sound like a broken record, but this again depends on the goal you have to market to your audience: are you looking to grow your audience or re-market to your existing audience?

Monira Kamal, Marketing, Festival of Animation Berlin Germany

Interview 2

Interview 3

The lockdowns el have have created changes:

100% of festivals closed down

Auds move donline

New digital products and platforms emerged

Artistic practices evolved

Audience behaviour changed

Aus data

COVID-19 Audience Outlook Monitor 2020 by Australia Council for the Arts

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Source: Australia Council for the Arts

UN data on festivals

FFI data on user research

In India

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Source: Indian consumer sentiment during the coronavirus crisis survey by McKinsey India, 2020

Festival Attendance

- Tend to prioritise content over everything else; performers, line-ups.
- Curious and want to expand horizons
- Audiences are looking for ‘inspiration’, new experiences.
- Anxious about aesthetic and festival experience they can identify with.
- Are audiences cultural carnivores or do they have genre preferences? How is this different in the digital?
- Requires recommendations from friends & family to be convinced to attend.
- Reliable sources: word of mouth, digital platforms (Social media).
- Want information about the festival until the last day.
- Place a premium on how is the festival organised, run, facilities provided.
- Sharing on social media is now a part of our culture.

Interview 1

When we think of an arts audience we are

Who are these people? Why are they here? What do they expect? What do they think about the experience? What else might they come to or do with us?

Interview 2

Interview 3

Cutting Edge | Brokering a new future for cultural policymaking

<https://en.unesco.org/news/cutting-edge-brokering-new-future-cultural-policymaking>

When the gigs are gone: Valuing arts, culture and media in the COVID-19 pandemic

<https://www.sciencedirect.com/science/article/pii/S2590291120300863>

THE ASCENDANCE OF "DIGITAL CULTURE"

<https://www.artsmanagement.net/Articles/The-Pandemic-as-a-Factor-of-Transformation-in-Arts-and-Culture-The-Ascendance-of-Digital-Culture.4174>

[OECD Policy Responses to Coronavirus \(COVID-19\)](#)

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